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ABSTRACT

This document presents a plan for course and credit transfer between Oregon community colleges and Oregon University System (OUS) institutions. It outlines the current and proposed policies, practices, and procedures for providing effective course and credit transfer in the state. The document also provides a summary of intersector communication and collaboration activities, examples of which include course-equivalency tables on institutional Web sites, articulation hotline telephone numbers on Web sites, an intersector Web page, an annual OUS counselor/advisor conference, an associate of arts Oregon transfer degree, regional partnerships, dual enrollment and co-admission agreements, and the Joint Boards Articulation Commission. It then describes how the State Board of Higher Education and the State Board of Education have advanced the transfer plan. Two appendixes provide a brief history of course and credit transfer accomplishments in Oregon and transfer student data. Attachments include copies of Oregon House Bill 2387 (1997), the 1998 Joint Boards Articulation Agreement, an articulation hotline list, the 1997 OUS Solution Team Report and the 1998 OUS Transfer and Articulation Status Report, and OUS internal management directives. (MDM)

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A Plan for Course and Credit Transfer Between Oregon Community Colleges and Oregon University System Institutions

by the
State Board of Education
and the
State Board of Higher Education

February 1, 1999
(for Joint Boards Working Group, January 13, 1999)

Prepared for submission to the
Oregon Legislative Assembly by the

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A Plan for Course and Credit Transfer Between Oregon Community Colleges and Oregon University System Institutions

Executive Summary

Presentation of a "plan for course and credit transfer" was called for in the 1997 Legislative Assembly's HB 2387 (ORS 341.425). This plan was prepared by staff of the Oregon University System Chancellor's Office and the Office of Community College Services, under the auspices of the Joint Boards Articulation Commission, and approved by the Joint Boards of Education.

The underlying principles used in the preparation of this plan were:

- effective communication (between institutions as well as between institutions and students) is critical to course and credit transfer success;
- course and credit transfer among the public institutions is a successfully-completed process in the overwhelming majority of cases; and
- an effective infrastructure is in place to address course and credit transfer issues when they arise.

The full plan for course and credit transfer outlines the current and proposed policies, practices and procedures for providing effective course and credit transfer in the State of Oregon. A summary of intersector communication and collaboration activities is provided, followed by a synopsis of the Board of Higher Education and the Board of Education efforts to advance this plan. Finally, directions and future plans are discussed.

University System/Community College (Intersector) Communication
Examples of intersector communication now in place to support transfer of courses between community colleges and OUS institutions include the following:

- *Course-equivalency tables on the web.* Web sites that make it possible to determine the relationship of community college and OUS courses allow transfer students to determine *what* courses transfer and *how* they transfer.
- *Articulation Hotline list on the web.* A list of campus resource individuals who are knowledgeable about transfer issues is available at the Joint Boards Articulation Commission (JBAC) web site.
- *Intersector web page and progress toward a "virtual university."* The Oregon Network for Education (ONE) is a single web site representing the public and private baccalaureate-granting institutions, the community colleges, and K-12.
- *Counselor/advisor conference.* The Oregon University System sponsors an annual conference bringing together community college and university staff.
- *Joint meetings of the senior academic officers of the University System and the community colleges.* Once or twice a year these groups meet to identify, discuss, and take action regarding policy and program issues that arise between and among sectors.

University System/Community College (Intersector) Collaboration
Examples of intersector collaboration now in place to support transfer of courses between community colleges and OUS institutions include the following:

- *Associate of Arts/Oregon Transfer Degree (AA/OT).* A block transfer degree is available from every community college which guarantees graduates that they have fulfilled lower-division general education requirements, and have junior status for registration purposes, at the OUS campus to which they transfer.
- *Joint Boards Articulation Commission (JBAC).* The JBAC is an intersector group charged with advising the Joint Boards on intersector policy issues with respect to transfer and articulation.
- *Joint Boards Articulation Agreement.* Originally entered into by the Board of Education and the Board of Higher Education in 1978, this recently-updated (1998) agreement spells out specific assumptions, principles and responsibilities to guide the schools, colleges, and universities in their efforts to serve transferring students and coordinate off-campus and distance education in Oregon.
- *Regional partnerships and activities.* Partnership agreements between OUS institutions and community colleges work toward the best interests of students engaged in postsecondary pursuits.
- *Dual-enrollment and Co-admissions agreements.* In these types of programs, OUS institutions and community colleges work closely together to provide an integrated, seamless, student-centered approach to postsecondary education.
- *Other articulation agreements.* OUS institutions and Oregon community colleges have established a wide

range of college to college written agreements covering the transfer of courses.

- *Advising and registration procedures.* Advisors from all campuses stay informed about the educational options on other campuses..
- *Financial aid consortial agreements.* Consortial agreements have been developed between OUS and community college campuses to allow co-enrolled students to use credits at more than one institution to determine financial-aid eligibility.
- *Associate of Arts/Oregon Transfer Degree available through distance education technologies.*

State Board of Higher Education Efforts to Advance This Plan

Examples of Oregon University System/State Board of Higher Education efforts now in place to support transfer of courses between community colleges and OUS institutions include the following:

- *OUS strategic planning initiative and the Solution Team on Access, Transfer, and Community Colleges.*
- *OUS policy on transfer and articulation.* This February, 1998, policy from the Board of Higher Education detailed progress in the area of transfer and articulation and identified thirteen specific strategic actions to address course and credit transfer concerns.
- *New Internal Management Directives* . At the October, 1998, meeting of the Board of Higher Education, new Internal Management Directives were approved, including one section addressing Articulation and Transfer."
- *Appointment of Director of Community College Articulation.*

State Board of Education Efforts to Advance This Plan

Examples of Office of Community College Services/Board of Education efforts now in place to support transfer of courses between community colleges and OUS institutions include the following:

- *Articulation information included as a required element in program approval.* The State Board of Education requires information about articulation of courses as part to their approval of new programs.
- *Staff assigned to manage articulation.*
- *The Oregon Community College Uniform Reporting System (OCCURS).* This project assists the colleges in determining transfer patterns and tracking student success.

Directions and Future Plans

Areas of intersector activity to be continued and/or developed to support transfer of courses between community colleges and OUS institutions include the following:

- *Joint Discussions of Implications of a Proficiency-based K-16 Educational System.* Three areas of anticipated activity are: (1) remedial coursework, (2) transcripting processes/procedures, and (3) discipline-based problem solving.
- *Communication and access to student information.* OUS and community colleges will need to work to establish common guidelines for the definition and release of student directory information to accommodate ready access to other educational institutions which have on-going legitimate needs for such information.
- *Automated course-equivalency and electronic degree-audit system.* The development of a statewide course-equivalency information system is the first step toward establishing an automated degree audit system which would enable transfer students to determine the courses and/or competencies they would still need to complete in order to obtain a baccalaureate degree.
- *Ongoing data-collection and research efforts.*
- *Commitment to regional partnerships, co-enrollment and dual-admissions programs, and other collaborative efforts.*

Note: Copies of the full report may be obtained by contacting Jim Arnold at the Oregon University System, Office of Academic Affairs, P. O. Box 3175, Eugene, OR 97403. Phone: 541-346-5722. Fax: 541-346-5764. Email: Jim_Arnold@ous.edu

Introduction and Purpose

ORS 341.425 was amended in 1997, in part, to read:

> The State Board of Education and the State Board of Higher Education shall jointly submit a plan for the transfer of credits between community colleges and state institutions of higher education to the Legislative Assembly for approval prior to February 1, 1999.[1]

The purpose of this document is to present the plan for course and credit transfer for approval by the 1999 Oregon Legislative Assembly. This plan was prepared by staff of the Oregon University System Chancellor's Office and the Office of Community College Services, under the auspices of the Joint Boards Articulation Commission – a body created by the Joint Boards of Education to address intersector transfer and articulation issues (a full description of this group appears later in this report). The Joint Boards of Education (the combined membership of the Board of Education and the Board of Higher Education) accepted a preliminary version of this plan for submission to the Legislative Assembly at its November 20, 1998, meeting. This final draft was approved by the Joint Board Working Group, acting for the Joint Boards, at its January 13, 1999 meeting. This plan was developed by widely consulting representatives of the community college and university system sectors and has received widespread support.

Definitions and Assumptions Utilized in the Development of This Plan

The term "transfer" (as in "transfer student") is defined as the process which includes the evaluation and acceptance of credits by, as well as the admission of students to, a receiving campus.[2] In this process, courses (and the credit previously received for those courses) are examined and accepted (or not accepted) for credit at the receiving institution. "Articulation" is the process whereby two or more institutions align courses and programs to ensure the smooth flow of students between campuses.

Although significant transfer activity takes place between community colleges, the public four-year institutions, and the public and private sectors, in this document the focus will be on transfer activity between the community colleges in the State of Oregon and the baccalaureate-granting, four-year public (Oregon University System) institutions.

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[1] This statute calls for *approval* of this plan by the Legislative Assembly – or an alternative course of action is specified (indicating that the board of a community college district shall submit courses for transfer approval to the Board of Higher Education). A copy of the bill (HB 2387) is included in the Attachments section.

[2] Oregon University System (OUS) "transfer students" must have completed a minimum of 24-36 credits of acceptable college-level work. The hours required vary among the OUS campuses. Students with fewer hours of college credit are admitted as "first-time freshmen" and their admission is on the basis of their high school-level academic performance (though their college credits earned *are* eligible to transfer).

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Given the variety and number of postsecondary institutions, and of courses offered at those institutions, determining the acceptability of courses and credit earned at another institution can be a daunting task. The complexity of the process is made more manageable, however, when the level of communication between institutions is enhanced. **An underlying assumption of this plan for course and credit transfer is that the more effective the communication mechanisms between the Oregon community college and university sectors, and between the institutional representatives and students, the more "student-centered," user-friendly, and predictable the transfer process will be.**

In Oregon, communication mechanisms between the state's 17 community colleges and the 7 public baccalaureate-granting institutions work well and this condition is documented in this plan. Hence, **another underlying assumption of this plan is that course and credit transfer among the public institutions in the state of Oregon is a successfully-completed process in the overwhelming majority of cases.**[3] All the available data suggest that this is the case, as well as the very small number of complaints to campus administrative offices about such matters. Additionally, as this report will show, **an effective infrastructure is currently in place in the State of Oregon to monitor as well as address course and credit issues when they arise.** The Board of Higher Education and the Board of Education are committed to making continuing improvements in the course and credit transfer process.

Times have changed with respect to how many colleges students pursue their postsecondary education in the 1990s. The "traditional model" of college attendance is outmoded. No longer do recent high school graduates attending a four-year residential college or university represent the typical student. Nor does a "linear model" of the transfer student fit: two years of attendance at one community college followed by two years at a four-year institution is not the norm.[4] While it is true that many Oregon high school students pursue a postsecondary experience directly out of high school, they are joined by many other individuals (often termed "non-traditional" students because of their age and life situation) interested in a variety of personal-development and career-enhancement experiences. And many students, both traditional and non-traditional, choose to construct courses of study by picking and choosing among the academic offerings of several postsecondary providers, according to a variety of factors which meet personal needs (time, location, availability, instructor, cost, etc.). The advent and ease of distance education offerings, of course, make this scenario all the more likely for the future.

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[3] The *ease* with which course and credit transfer takes place is commonly misunderstood. For example, English and writing courses in the lower-division undergraduate curriculum are highly standardized–and widely recognized as such. A vast array of such courses transfer without question between the community colleges and the baccalaureate-granting institutions. Data regarding "transfer efficiency" are limited, though two available studies (one in the Portland metro area, and one from the University of Oregon), suggest that somewhere in the range of 75 to 91 percent of all credits submitted for transfer are accepted by receiving institutions. See p. 3 for a list of categories that non-accepted credits typically fall into.

[4] Indeed, a recent study (transcript analysis) of transfer student patterns and outcomes in the Portland metropolitan area demonstrated that "students moved among the community colleges and the university [Portland State] as if they were part of a single complex educational system" (Kinnick, 1997, p. 8). The (504) students in the sample exhibited *74 different patterns of movement* among the metro area community colleges and the university!

Therefore, for today's students ultimately interested in earning a baccalaureate degree, the transfer of credits from one institution to another is a necessity – a situation which creates challenges for institutions. As this plan will demonstrate, postsecondary education providers in Oregon are meeting this challenge.

And, it must be recognized that course and credit transfer *can* be a challenge – in some instances. Students as well as institutions bear responsibility for making the course and credit transfer process work. That means all parties must pay close attention to the conditions facilitative of that process. Students need to be aware, for example, that:

- courses that transfer to the institution do not automatically meet the requirements for a particular major

- courses numbered below the 100 level are not considered "college level" work and do not transfer to baccalaureate-granting institutions

- courses which were not completed with a passing grade do not transfer to the baccalaureate-granting institution

- "professional-technical" courses may or may not transfer to the baccalaureate-granting institution, either because there is no equivalent course on the receiving campus, or the number of credits of professional-technical courses may be limited by the receiving campus.

Students who are most successful in the course and credit transfer process are typically those who are the most well informed and advised about their postsecondary options. Oregon University System institutions and the Oregon community colleges are committed to making the information available to students to assist them in making the best possible decisions.

The Plan: Communication and Collaboration Among Oregon's Community Colleges and Public Universities Provides Effective Course and Credit Transfer

The plan for course and credit transfer, called for in ORS 341.425 and described in this section, is based on high levels of intersector communication and collaboration, and builds on the "Joint Vision" expressed by the Joint Boards of Education in developing plans for expanded access to postsecondary education through increased use of technology and regional partnerships. The "vision," developed by the Joint Boards Working Group and subsequently endorsed by the Joint Boards is:

> The 21st Century will be a rapidly changing social, economic, and global information-based competitive environment. For the State of Oregon and its citizens to thrive in this environment, we need an education system that is not a collection of separate parts, but a continuum of opportunities stretching from early childhood through postsecondary training and lifelong learning. Community colleges and universities, vital in an information-based environment, will increasingly work together to expedite access to postsecondary education, through joint planning and collaborative programming. Two significant realities impact this vision: 1) postsecondary education is difficult for many Oregonians to access, both financially and geographically; 2) rapid applications of emerging technologies, especially telecommunications, are changing the education marketplace (the way campuses provide access, enrich programs on and off campus, and participate in partnerships). The Joint Boards of Education plan action to expand access to postsecondary education through increased use of technology and regional partnerships...

The public two-year and four-year postsecondary institutions in Oregon are committed to effective course and credit transfer between and among their campuses. Academic and student services administrators of both sectors work together with the interests of students as their primary concern. Effective course and credit transfer is based on high levels of trust and communication, and a collaborative, student-centered approach toward postsecondary education. Examples of intersector communication and collaboration efforts are bountiful and create an environment for effective course and credit transfer. The mechanisms in place which benefit students, faculty, advisors, counselors, and administrators in the transfer process are described in the next sections of this plan.

How University System/Community College (Intersector) Communication Enhances Course and Credit Transfer

Course-equivalency tables on web. "Equivalency" of college and university courses is the primary basis for course and credit transfer decisions. When students, faculty, advisors, and counselors know *what* courses transfer and *how* they transfer, the process for transfer of credits goes smoothly. Although a variety of campus-to-campus articulation agreements address specifics of how credit transfer proceeds for students enrolled in particular programs (e.g., engineering, nursing, etc.), most of the course and credit transfer activity between institutions is not handled in that manner, but rather through a course-by-course equivalency determination.

Some of the Oregon University System campuses have constructed extensive searchable databases that enable anyone with Internet access to determine the relationship between courses offered by the other postsecondary institutions (including the Oregon community colleges) and their university. The three large OUS universities [Oregon State University (OSU), Portland State University (PSU), and University of Oregon (UO)] have well-developed course-equivalency databases available on the World Wide Web,[5] and the Oregon Institute of Technology (OIT) has its articulation agreements with other campuses on the Web[6] making it possible to determine how courses in a range of degree programs align. The three regional universities [Eastern Oregon University (EOU), Southern Oregon University (SOU) and Western Oregon University (WOU)] do not presently possess the resource capability to implement a web-based course-equivalency system on their campuses, although the transfer and articulation policy adopted by the Board of Higher Education in February, 1998, encourages them to work along those lines.

The OUS 1999-2001 Biennial Budget Request, in the "Legislative Program Policy Options" section, included funds proposed for developing a systemwide course-equivalency system – to include lower-division courses and selected upper-division courses from all OUS institutions and Oregon community colleges and to be generally available on the Web. Such a system is envisioned to enable anyone to determine the relationship of any lower-division undergraduate course at any Oregon postsecondary institution to its counterpart on another campus (though the focus, in the first stages of development, will be on Oregon community college to OUS institution transfer activity). While the development and maintenance of a centralized course-equivalency information system depends on securing additional resources to do so, the Oregon University System is determined to work toward the development of this type of system to aid students (and campus staff who work with them) engaged in the transfer process.

Joint Boards Articulation Commission (JBAC) home page. The Joint Boards Articulation Commission (JBAC) is an intersector group charged by the Joint Boards of Education to: (1) advise the Joint Boards on major intersector policy issues regarding improvement of student access and transfer, curricular development and articulation, outcomes assessment, and student data integration; (2) monitor the implementation and revision of the Associate of Arts Oregon Transfer (AA/OT) degree policy and common course numbering for lower division courses, and (3) serve as a forum for problem solving and referral. The JBAC has interpreted its charge to include facilitating communication between the educational sectors regarding any issue pertaining to articulation and transfer. Hence, in the spring of 1997, the JBAC established its own presence on the World Wide Web[7], designated as "The Articulation and Transfer Home Page for Transfer Students and Transfer-Student Issues." The site is described as "specifically for transfer students and prospective transfer students – as well as advisors, counselors, faculty members, administrators, and policymakers interested in transfer students and their issues." Included at this site are separate sections for: (1) Transfer Students and Prospective Transfer Students; (2) Advisors, Counselors, and Faculty Members; and (3) JBAC Members, Policymakers, and Administrators. For students, links are included to all OUS institutions and Oregon community colleges, information about the Associate of Arts/Oregon Transfer degree, who to contact about transfer problems, and a comprehensive list of campus resource individuals (see below). Other important resources are provided for faculty, advisors, and administrators who work with transfer students and the issues that arise during the transfer process.

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[5] OSU: http://osu.orst.edu/admissions/; PSU: http://www.ess.pdx.edu/adm/; UO: http://darkwing.uoregon.edu/~admit/index.htm

[6] http://www.oit.edu/admiss/

[7] http://www.ous.edu/aca/jbac.html

Articulation Hotline. One of the most valuable sections of the JBAC web site (above) is the "articulation hotline" section[8]...which provides name and phone number information for campus-level individuals who can answer questions about articulation and transfer. There are two areas to the hotline list, one for the Public and Private Colleges and Universities (the "four-year schools") and another section for the Community Colleges (the "two-year schools"). (This list had been distributed as hard copy during the last few years -- and has been available electronically on the web since the spring of 1997.)

Intersector web page ("ONE") and progress toward an Oregon "virtual university." The "Oregon Network for Education" effort, initiated in 1995-96, and endorsed and directed by the Joint Boards of Education, led to an intersector presence on the World Wide Web[9]. In effect, ONE is a one-stop educational "mall", designed to inform students, prospective students, parents, school counselors, employers, and others about educational programs and services available in the state. The project is a collaboration of 42 postsecondary institutions, plus K-12 partners, that provides information about postsecondary courses/services in distance education and is a resource for cooperative planning and policy development. The seven "doors" to this educational "mall" lead to: (1) Public & Private 4-year Colleges/Universities. (2) Public & Private 2-year Colleges, (3) Public & Private K-12 Schools, (4) Learning Supports, (5) Online Libraries, (6) Employee Development Opportunities, (7) General Oregon Information.

From the outset, ONE has been envisioned to ultimately include an 8th "door" to an Oregon "Virtual University," enabling time- and place-bound students in Oregon to electronically access courses and degree programs available from the range of our postsecondary education providers. A recent (September, 1998) multi-year federal grant from the Fund for the Improvement of Postsecondary Education (FIPSE) has given planners the resources to work on realizing this vision. This grant will enable ONE to develop:

- a Web-searchable "common college catalog" of distance education courses, degree programs, and services available from Oregon's postsecondary providers;

- a "common course marketplace" to enable campuses to share some courses for residency credit;

- a financial formula for assigning costs and revenue among campuses; and

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[8] http:/www.ous.edu/aca/articdoc.html (see Attachments section)

[9] http:/www.osshe.edu/one/

- a designation of "host" institutions to serve students seeking college degrees via distance education.

The presence of this new "virtual university" on the Web should allow even more flexibility and ease of movement for students seeking to construct degree programs from a variety of Oregon's postsecondary education institutions. With postsecondary providers working together in a shared environment, ease of course and credit transfer will be enhanced.

Counselor/advisor conference. A recently added feature to intersector communication (since 1996) is the annual Oregon University System-sponsored statewide conference for community college counselors and advisors (as well as others on the two-year campuses with responsibilities in the transfer and articulation areas).[10] Also participating in the conference are numerous representatives of OUS admissions offices as well as academic and student affairs administrators from both the two-year and four-year sectors. This regularly scheduled fall event (November in 1997 and 1998), brings together representatives from both sectors and provides them a forum for formal information sharing sessions as well as informal networking opportunities. The focus of the event is transfer students and resolving the issues arising from the transfer process.

Joint meetings of the senior academic officers of the community colleges and OUS institutions. The "Academic Council" (AC) is the group of senior academic administrators from the Oregon University System and the "Chief Academic Officers" (CAO) is the corresponding group from the community colleges. Once or twice a year (usually spring and fall), these groups engage in a joint meeting to identify, discuss, and take actions regarding policy and program issues that arise between and among sectors.

How University System/Community College (Intersector) Collaboration Enhances Course and Credit Transfer

The Associate of Arts/Oregon Transfer Degree (AA/OT). In 1987, the Oregon Legislative Assembly passed HB 2913 which called for the Department of Higher Education (through the Chancellor's Office) and the Department of Education (through the Commissioner, Office of Community College Services) to "develop a set of general requirements for transfer students seeking admission to the State System of Higher Education (now called the Oregon University System) institutions that can provide a high quality curriculum." An intersector working committee subsequently developed the Associate of Arts/Oregon Transfer degree. Each of the Oregon community colleges now offers a version of this degree, designed specifically for students who intend to transfer to an OUS institution. The degree structure calls for a minimum of 90 quarter hours to be earned, at least 58 of which meet broad general education and distribution requirements agreed upon by the working group. The remaining 32 credits are electives or courses in a student's major. General education requirements of the degree specify credits and courses in writing, mathematics and oral communication/rhetoric. The distribution requirements specify credits to be earned in Arts and Letters, Social Sciences, and Science/Math/Computer Science.

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[10] Although the theme varies from year to year, the event is billed annually as the "Educating Oregon Together" conference.

Students transferring to an OUS institution with the AA/OT degree have satisfied that institution's undergraduate general education requirements and have junior standing for registration purposes. In 1996-97, Oregon community colleges awarded 2,031 AA/OT degrees, up from the previous two years (1,867 in 1994-95; 1,781 in 1995-96). Annually, about 3,000 newly admitted undergraduate students transfer to an OUS institution from Oregon community colleges. Of that number, about 500 have earned the AA/OT degree. Oversight of the transfer degree implementation is provided by the Joint Boards Articulation Commission (see below).

The structure of the AA/OT underwent a minor revision in 1994, as the Joint Boards Articulation Commission (JBAC, see below) monitored the degree's initial implementation. Then, in 1998, another modification was made to the degree: after extensive review of the community colleges' structure of the degree, and in order to align with OUS institutions' practices with respect to acceptance of professional-technical credits, the JBAC recommended, and the Joint Boards approved, that the AA/OT accommodate up to 12 professional-technical credits (as identified as appropriate for transfer, from its own offerings, by the community college conferring the degree).

Joint Boards Articulation Commission (JBAC). As described above, the Joint Boards Articulation Commission (JBAC, started in 1992 as a successor to the "HB 2913 Committee" and the "State System/Community College Coordinating Committee" – earlier efforts at intersector collaboration) is an intersector group (with representatives from the Oregon community colleges, Oregon University System, independent colleges, Oregon Department of Education, and K-12), charged with advising the Joint Boards of Education on major intersector policy issues with respect to transfer and articulation. Regular meetings of this group are scheduled every month during the academic year. The Commission includes a community college president and OUS institution president, with the JBAC chair rotating between these two campus chief executives. Staff support for the group is supplied by the OUS Chancellor's Office and the Office of Community College Services.

One of the major charges of the JBAC is to monitor the implementation of the Associate of Arts/Oregon Transfer (AA/OT) degree (described above). This degree is offered by the 17 community colleges and accepted by the 7 OUS institutions. One revision to the degree structure was made in 1994. And during the 1997-98 academic year, another re-examination of the degree was undertaken. During the most recent process, the JBAC recommended to the Joint Boards that minor clarifications be made to the degree with respect to the inclusion of professional-technical courses and credits as well as the role of WR 115 (a writing course) in the curriculum.

Joint Boards Articulation Agreement. A long-standing symbol of intersector collaboration is the articulation agreement originally entered into by the Board of Education and Board of Higher Education in 1978. This agreement spells out specific assumptions, principles and responsibilities to guide the schools, colleges, and universities in their efforts to serve transferring students and coordinate off-campus and distance education in Oregon. This agreement has undergone two revisions, one in 1993 and the most recent in 1998. A copy of the latest version of the Joint Boards Articulation Agreement is included in the Attachments section.

Regional partnerships and activities. New regional partnerships between the community colleges and OUS institutions work toward the best interests of students engaged in postsecondary pursuits. In this section, some of the alliances forged in the Portland metropolitan area, in Eastern Oregon, Southern and Southwestern Oregon, and in Central Oregon, are described.

- *Portland area*. In January 1997, Portland State University(PSU) and Clackamas Community College (CCC) entered into a partnership agreement that promotes the successful movement of students between the two institutions. The arrangement has led to the creation of collaborative student support services, including joint student recruitment, co-admissions, integrated advisement and orientation, financial aid consortium agreements, and shared library and technological support services. Student interest and participation in this effort has been high. Additionally, the agreement has integrated curricular offerings, including: collaborative Associate of Arts and baccalaureate accelerated degree completion programs offered at the Clackamas campus, enhanced faculty collaboration and improved program articulation.

  PSU is also actively involved in establishing similar partnerships with other community colleges in the metropolitan area. In September, 1998, PSU and Mount Hood Community College entered into an agreement similar to the PSU/Clackamas program. Discussions are also underway between PSU and both Chemeketa and Portland Community Colleges. PSU has a baccalaureate degree completion program with Chemeketa Community College.

  Additionally, Portland State University, Clackamas Community College, Mount Hood Community College, and Portland Community College, have established a metropolitan-area research consortium to assess student transfer patterns and experiences in the metro area. The group has provided valuable information to support and establish the articulation efforts between PSU and the area community colleges.

- *Eastern Oregon*. Eastern Oregon University (EOU) has consortial financial aid agreements with the community colleges in Eastern Oregon that facilitate transfer. For more than a decade, EOU has delivered baccalaureate programs on the Blue Mountain Community College (BMCC) and Treasure Valley Community Colleges (TVCC) campuses. EOU's teacher preparation programs are delivered at the Central Oregon University Center (see below), as well as the BMCC and TVCC campuses. And, in collaboration with other universities, Eastern delivers the Tri-State General Agriculture degree to BMCC and TVCC.

- *Southern Oregon*. The Oregon Institute of Technology (OIT) is engaged in a collaborative partnership with Klamath Community College (KCC) and PCC. (In this arrangement, the newly formed KCC contracts with PCC for program accreditation and infrastructure services.) OIT and KCC work together under an agreement providing for coordination of general education services, cross-registration services, and tuition equalization on selected courses. The institutional partners have tackled difficult issues, such as differences in admissions standards, residency for tuition purposes, FTE reporting, tuition and fee differences, billing procedures, student confidentiality, and student services for shared courses.

Southern Oregon University (SOU) and Rogue Community College (RCC) have developed policies and procedures so that students can register for courses in Medford at either institution's registration centers. Staff are cross trained to use registration software and to answer questions about both RCC and SOU. Staff also spend time on site at the other's location, helping out during busy times. The two institutions have agreed to policies on student advising, testing for placement in math and writing courses, and have a financial aid agreement covering students co-enrolled at both institutions. Consistent with their intensive collaborative efforts, SOU and RCC share classrooms, science labs, and computer labs in Medford. The campuses have developed schedules that cross list courses so students can easily see all the offerings by both SOU and RCC (in the Medford area). A pilot project with a shared staff member helping to strengthen Native American programs at both institutions is in progress.

- *Southwestern Oregon.* An emerging initiative, made possible by funding through the Emergency Board in June, 1998, is the Southwestern Oregon University Center in Coos Bay. This Center is being modeled after its successful Central Oregon counterpart (see below), and will offer a variety of OUS bachelor's and master's degrees on the campus of Southwestern Oregon Community College (SWOCC). This project is a collaborative effort between OUS and SWOCC.

- *Central Oregon.* Perhaps the most ambitious of the intersector partnership efforts exists in Central Oregon. Central Oregon Community College (COCC) is the site of the "Central Oregon University Center" (COUC), a collaborative effort of OUS, COCC, and OCCS.[11] At the present time, 23 bachelor's and master's degrees are offered through the COUC by the participating institutions. Participating faculty include COCC faculty, resident OUS faculty, OUS telecommunications faculty, and private college faculty. Course delivery mechanisms include on-site instruction, Oregon ED-NET, Internet, and other technologies. This Center also received special funding in June, 1998, through an Emergency Board allocation to initiate a new bachelor's degree program in general science and to enhance laboratory facilities at COCC. At their respective meetings in late fall 1998, the COCC Board and the Board of Higher Education endorsed a vision and a plan for expanded higher education services in Central Oregon, including a permanent institutional presence.

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[11] Provider OUS institutions are: Eastern Oregon University, Oregon Institute of Technology, Oregon State University, Portland State University, Southern Oregon University, University of Oregon, Oregon Center for Advanced Technology Education (OCATE), Oregon Health Sciences University at OIT. Participating independent colleges are: Lewis & Clark College, Linfield College.

Dual-enrollment and Co-admissions agreements. Implemented during the 1997-98 academic year, two examples of dual-enrollment/co-admission arrangements are: (1) the PSU/Clackamas Community College partnership described in the previous section, and (2) the Oregon State University/Linn-Benton Community College "Dual Admission/Enrollment Program." In both of these programs, the OUS institution and the nearby community college work closely together to provide an integrated, seamless, student-centered approach to postsecondary education. For example, features of the OSU/LBCC program include: (1) one application process for both institutions, (2) advising available at either campus, (3) increased flexibility in scheduling with access to more classes, (4) opportunity to access services and participate in college life on both campuses, (5) an integrated system of financial aid administration for eligible students, (6) access to library and computer resources on both campuses, (7) skill-building through preparatory courses at LBCC and lower division courses at either LBCC or OSU, and (8) easier transition from community college to university by virtue of program participation.

Degree-acceleration programs; early options for high school students. Oregon University System institutions and community colleges work closely with secondary schools to provide opportunities for students desirous of getting a head start on their college work. High school students are able to participate in courses and programs on both high school and college campuses to concurrently earn high school and college credit. The college credit thus earned may be transferred and applied to degree programs at the college of their choice. Among the early options available are:

- *College-High (CH).* CH programs are voluntary cooperative educational program agreements between high schools and colleges to offer college-level courses for credit in the high school. CH programs were first developed in Oregon in the 1970s. Courses are taught by high school teachers and result in students earning dual credit, i.e., high school credit/college credit. The colleges are responsible for the curricular content and standards, administrative support, and program monitoring. At present, there are 14 community colleges and 3 OUS institutions that participate in CH around the state, working with about 165 high schools. Some 6,000 students participate annually in CH programs.

- *Concurrent Enrollment (CE).* CE programs enable students to register for college courses, while simultaneously receiving credits toward high school diploma requirements. The key difference between CH and CE is that students in CE enroll in courses taught by college faculty, whether at the college campus or in courses delivered to the high school site by the college. Increasingly, students are participating in CE courses that are offered via distance education, such as telecourses and Internet courses. Students pay for the cost of the college tuition to participate in CE courses; in some cases, school districts cover a portion of the tuition costs if the high school is unable to meet the needs of students for more advanced level courses. This is most typical in mathematics areas where there are not enough students to offer a Calculus or Advanced Calculus course at the high school, so the students are enrolled in a nearby college mathematics course with the district covering the college tuition.

Other articulation agreements. OUS institutions and Oregon community colleges have established a wide range of (primarily bilateral) written agreements covering the transfer of courses from two-year to four-year programs. Agreements of this type explain the relationship of the community college courses to those on the OUS campus (what the student is given credit for on the four-year campus, as in the course-equivalency information discussed earlier), the number and type of upper-division credits still needing to be completed for a baccalaureate degree by the transfer student, limits to program enrollment, and information about which version of the college catalog is to be followed to complete the degree program. In all cases, the purpose of the agreement is to facilitate ease of transfer from one campus to another.

Advising & registration procedures. Joint intersector cooperation with respect to advising and registration practices have been addressed in sections above. The efforts of Southern Oregon University with Rogue Community College; Portland State University with Clackamas Community College; Eastern Oregon University with Treasure Valley Community College and Blue Mountain Community College; and Oregon State University with Linn-Benton Community College are particularly innovative in this area. These campuses have paid close attention to the needs of students as they traverse the postsecondary education sectors and set up processes that allow students to more readily experience the transition as "seamlessly" as possible. Advisors of both the two-year and four-year campuses are knowledgeable about each other's programs in order to more effectively inform students of their options. Further, registration procedures have been put into place for students co-enrolled that eliminate or minimize the number of stops, and the time involved, in completing the registration process.

Financial aid consortial arrangements. Consortial agreements (commonly part of the regional partnerships/activities described above) have been developed between OUS and community college campuses to allow co-enrolled students to use credits at more than one institution to determine financial-aid eligibility. Such arrangements are necessary because the "home" institution is responsible for determining the courses taken at the "host" institution which count toward degree requirements. And the costs at the "host" institution must be accounted for in the student's budget. It is important for the two institutions to share student grade and registration information with one another. Many of the most problematic areas in the development of partnership agreements and providing seamless services to students arise in the area of financial aid delivery. The institutions of both postsecondary sectors continue to work diligently to find ways within the federal regulations to most effectively address issues of course and credit transfer.

Associate of Arts/Oregon Transfer Degree Available Through Distance Education Technologies. Three Oregon community colleges have all courses for the Associate of Arts/Oregon Transfer degree available through distance technologies and many others, although short of a full degree, have a significant number of courses available through some type of distance technology. With the addition of on-line courses the degree is now available anywhere in the state. All courses taken for this degree will transfer between Oregon public postsecondary institutions.

Alignment of CIM/CAM/PASS/PREP. Alignment of standards has been a key design criteria for the Certificate of Initial Mastery (CIM) and Certificate of Advanced Mastery (CAM). The OUS Proficiency-based Admission Standards System (PASS), and the community college PRoficiencies for Entry into Programs (PREP) standards are under final development.

State Board of Higher Education Efforts to Advance This Plan

The community colleges and the University System have both contributed to enhancing relationships, communication, policy initiatives, and ease of course and credit transfer for students. Among the specific efforts of the Oregon State Board of Higher Education are the following:

OUS strategic planning initiative and the Solution Team on Access, Transfer, and Community Colleges. The Oregon University System initiated, in 1995, a major strategic-planning process – an initiative that culminated in its third, and final, phase with the establishment of 17 "solution teams." One of these groups was dedicated to "access, transfer, and community colleges," with its charge to "develop a barrier-free admission and transfer process to enable students to achieve their academic goals [and to] partner with the community colleges to provide baccalaureate capacity and access."

The Solution Team was comprised of OUS, community college, independent college, and private sector representatives (having overlapping membership with the Joint Boards Articulation Commission) and utilized an iterative process to identify problematic areas, prioritize the issues and develop thematic areas for policy recommendations. The final report of the Solution Team was presented to the Board of Higher Education in October, 1997, and offered recommendations in five major categories:

- *Credit acceptance* – including the areas of credit for prior learning, professional-technical courses, and early options for high school students;

- *Student access strategies* – including the Oregon Network for Education (ONE) web site, enhances access to courses and information via a statewide catalog, and coordinated delivery of distance education;
- *Transfer* – including the Articulation Hotline list, and developing proficiency-based transfer vehicles;

- *Communication* – including the Chancellor's Office liaison with the community colleges, the hotline listserv, joint meetings of the Academic Council (OUS) and the Chief Academic Officers (community colleges), faculty discipline meetings, and an inventory of partnerships ad compilation of date profiling student progress; AND

- *Comprehensive, collaborative student services* – including supporting advisors and counselors, enhancing a seamless model of student services (especially financial aid), and establishing a co-admission task force.

The work of this group fed directly into the work plan of the Joint Boards Articulation Commission for 1997-98 and provided the foundation for the topics considered by the Action Teams the JBAC subsequently established. The Solution Team recommendations also led to the Board policy on transfer and articulation adopted in February, 1998 (see below).

Many of these recommendations have moved into the implementation phase since the work of the Solution Team. For example:

- In the area of "credit acceptance:" the Joint Boards Articulation Commission has recommended, and the Joint Boards has approved, the inclusion of up to twelve credits of professional-technical course work in the structure of the Associate of Arts/Oregon Transfer degree.
- In the area of "access strategies:" grant funds have been secured from the Fund for the Improvement of Postsecondary Education (U.S. Department of Education) for the advancement of the "Oregon Network for Education" web site.
- In the area of "transfer:" the Articulation Hotline list is available statewide via the Joint Boards Articulation Commission website.
- In the area of "communication:" regularly scheduled meetings of the OUS Academic Council and the community college's Chief Academic Officer groups now take place.
- In the area of "collaborative student services:" a special "action team" of the Joint Boards Articulation Commission has made a series of policy recommendations in this area which has stimulated dialog and study at the JBAC, OUS, and community college-system levels.

A copy of the full report of the OUS Solution Team on Access, Transfer, and Community Colleges is included in the Attachments section.

OUS policy on transfer and articulation. Following the Board of Higher Education's strategic planning process and the report of the Solution Team on Access, Transfer and Community Colleges issued in October, 1997, the Chancellor's Office/Office of Academic Affairs developed a policy proposal: "Transfer and Articulation: A Status Report with Recommendations for Board Policy and Strategic Action" (February, 1998; copy included in the Attachments section).This report detailed progress in the area of transfer and articulation and identified thirteen specific strategic actions to address course and credit transfer concerns. (The Board has subsequently incorporated some of these strategic actions into the revised Internal Management Directives, see below.) Specifically, the actions specified by the February, 1998 Board policy included:

- *Co-admission/co-enrollment programs.* Develop additional co-admission and co-enrollment programs for eligible students who begin their postsecondary education on community college campuses and who plan to complete their baccalaureate program at the partnering OUS institution. By enabling timely relationships with students through such programs, degree completion has a better chance of success.

- *Articulation agreements.* Support the development of articulation agreements between individual institutions within the array of educational service providers in the state. As the explosion of distance education, alternative format, and Web-based courses and programs from multiple educational service providers continues, formalized arrangements will facilitate an orderly flow of students from campus to campus. The new major regional partnerships have strong potential for meeting educational access needs.

- *Additional block transfer degree.* Work with the community colleges to develop a block transfer Associate of Science (AS) degree that would better fit students whose goals are to transfer to OUS programs in the sciences, health sciences, engineering, and other technical fields (and where the current AA/OT degree does not align with the baccalaureate major requirements).

- *Baccalaureate degree outcomes.* Establish the learning outcomes expected of a student graduating with a baccalaureate degree. Ease of transfer should eventually result if the focus is on the learning outcomes a student is able to demonstrate, rather than the course credits accumulated. Building on the work of PASS and other outcomes-based initiatives, a Systemwide task force, with participation from the community colleges, will be charged with identifying baccalaureate degree outcomes and their application to the transfer process.

- *Course equivalency information systems.* (1) Uniformly compile, regularly update, and widely distribute information regarding course equivalencies (between OUS institution courses and community college courses). System institutions presently lacking this capability should make it a priority for the next admission cycle. Publishing information on the World Wide Web, with a user-friendly interface, is the preferred distribution method. Contact persons at each institution should be identified for students, advisors, counselors, or others needing assistance in finding and interpreting the equivalency information as published. (2) At the System level, a standard course-equivalency information system should be created that builds on the efforts already in place at the campus level. Such a comprehensive data system would enable students and advisors to determine the relationship between all community college courses and similar courses offered at OUS institutions. Resources to accomplish this strategic action should be sought.

- *Discipline-based problem solving.* Convene and conduct periodic meetings among faculty in the same disciplines in community colleges and OUS institutions to discuss issues of mutual concern and to resolve problems. The Joint Boards Articulation Commission (JBAC), the Academic Council (OUS), and/or the Council of Instructional Administrators (community colleges) should sponsor such faculty forums. For example, faculty must resolve transfer issues related to similar (or the same) courses offered at the upper-division level in OUS institutions that are offered at the lower-division level in community colleges. Resolutions are required that do not disadvantage (e.g., with respect to upper-division credit requirements) transfer students who have earned credits in the community college courses.

- *Professional-technical courses.* Reach agreement between OUS institutions and the community colleges about how professional-technical courses and programs are defined and then operationalize transfer policies and procedures consistent with those definitions. Further, expand institutional policies and practices that facilitate student transfer from professional-technical programs into compatible and/or complementary baccalaureate programs.

- *Research agenda.* Establish a focused research agenda to inform the transfer and articulation policy agenda, and current and future strategic directions. Examples of such research questions should include (but are not limited to) : (1) What happens to the large number of AA/OT graduates who apparently do not transfer to an OUS institution? (2) What are the highest-demand programs for students transferring into OUS institutions? (3) How much time do students transferring in with an AA/OT, and/or other associate degree take to earn a baccalaureate degree? (4) What are the comparative success rates of students with different patterns of pursuits of the baccalaureate degree?

- *Institutional responsibilities.* Recognize that every institution bears an administrative responsibility for implementation and oversight of matters affecting transfer students. Each campus should review its capacity to respond to student problems and concerns, and make improvements as needed. (The Web-based JBAC Articulation Hotline provides links to the campus contacts who are responsible for transfer student issues.)

- *Communication, course sharing, and articulation.* Develop, in cooperation with the ONE (Oregon Network for Education) project, a Web-based common college catalog of distance education courses available from Oregon and partner institutions. Establish a "Common Course Marketplace" comprised of those distance education courses for which credit would be accepted at any participating Oregon institution. Resources to accomplish this strategic action should be sought. [Funds have recently been secured, from the Fund for the Improvement of Postsecondary Education (FIPSE), see above, to begin implementing the expansion of the ONE website.]

- *Early options programs.* Develop, with the Joint Boards, policies that support new and/or expanded partnerships among OUS, community colleges, and high schools to better serve "college-ready" high school students in early college programs and expedite student progress toward a college degree.

- *Intrasystem transfer issues.* Resolve "internal" (OUS institution to OUS institution) programmatic transfer issues. For example, students transferring upper-division credits from a System program that is not professionally accredited are sometimes required to repeat courses when moving to a program that is professionally accredited. Professionally accredited programs should work with "sending" programs to develop learning outcome-based ways to assure that transfer credits meet the specifications of their curriculum. Where this is unacceptable to accreditation groups, work to accommodate the demonstrated learning outcomes of transfer students.

- *Intersector transfer plan*. Work with the JBAC and its action teams to respond to the requirements of HB 2387, presenting an effective intersector transfer plan to the 1999 Legislature (i.e., this document).

The elements of this policy document speak to many long range objectives of easing some concerns in the area of course and credit transfer – and have provided the basis for dialog between the senior academic and student affairs administrators of the University System campuses and the community colleges. This policy also led directly to the establishment of the new internal management directives adopted by the Board of Higher Education (see below) as well as seeking funds for the development of a statewide course-equivalency information system.

New Internal Management Directives (IMDs). At the July 1998 meeting of the Board of Higher Education, a recommendation from the Governance and Structure Committee was approved that led to amendments of the University System's Internal Management Directives (IMDs). At their October 1998 meeting, the Board approved new IMDs, one section (2.035) of which addressed "Undergraduate Transfer and Articulation". These IMDs built on the work of the Solution Team on Access, Transfer, and Community Colleges (October 1997) as well as the Board policy on transfer and articulation (February 1998). The new IMDs are included in the Attachments section.

Appointment of Director of Community College Articulation. In January of 1997, the Chancellor's Office, recognizing the importance of improving and maintaining enhanced relationships with Oregon's community colleges, established the position of Director of Community College Articulation. The goal of this position has been to develop and implement strategies for improved articulation between the University System and the community colleges. The duties of the Director include the establishment an outreach program for the Office of Academic Affairs that engages University System staff with persons/programs/problems in community colleges related to improved student transfer.

State Board of Education Efforts to Advance This Plan

Articulation Information Included As a Required Element in Program Approval. The State Board of Education has required information about articulation of courses as part to their approval of new programs for several years.

Staff Assigned to Manage Articulation. The Instructional Unit Team Leader/Instruction Specialist for the Office of Community College Services has been charged with course approval, support to the Joint Boards Articulation Commission and its predecessor groups for at least two decades. Office of Professional Technical Education staff help to promote the articulation of approved programs between community colleges and other postsecondary institutions as well as with K-12.

The Oregon Community College Uniform Reporting System (OCCURS). Management information systems such as OCCURS have been greatly enhanced through the collaboration of the OCCS and OUS staff. This project has assisted the colleges in determining transfer patterns and tracking student success.

Directions & Future Plans

The Oregon University System institutions and the network of community colleges in the State continually work together to make improvements in the process for course and credit transfer. Additionally, campuses of both public sectors communicate with member institutions of the Oregon Independent Colleges Association to facilitate course and credit transfer between public and private institutions in the State. Efforts are currently underway to broaden the discussion between the public and private postsecondary sectors to more effectively serve transfer students.

The mechanisms put into place to facilitate the transfer process for students are considerable, as have been discussed above. To summarize, the communication and collaboration efforts now in existence are:

- Course-equivalency tables on the web
- Joint Boards Articulation Commission home page on the web
- Articulation Hotline list on the web
- Counselor/advisor conference
- Joint meetings of the senior academic officers of the University System and the community colleges
- Associate of Arts/Oregon Transfer Degree (AA/OT)
- Joint Boards Articulation Commission (JBAC)
- Joint Boards Articulation Agreement
- Regional partnerships and activities
- Dual-enrollment and Co-admissions agreements
- Acceleration mechanisms, early options for high school students
- Other articulation agreements
- Advising and registration procedures
- Financial aid consortial agreements
- Associate of Arts/Oregon Transfer Degree Available Through Distance Education Technologies
- Alignment of CIM/CAM/PASS/PREP
- OUS strategic planning initiative and the Solution Team on Access, Transfer, and Community Colleges
- OUS policy on transfer and articulation
- New OUS Internal Management Directives (IMDs)
- Appointment of OUS Director of Community College Articulation
- Articulation Information Included As a Required Element in Program Approval
- Staff Assigned to Manage Articulation
- The Oregon Community College Uniform Reporting System (OCCURS)

This list illustrates that an effective, responsive system is in place to handle course and credit transfer. No system is perfect, however, and the problems faced by transfer students today are not necessarily the ones to be faced by tomorrow's students. A look toward the future provides for optimism, though, since the infrastructure in existence in Oregon to solve issues related to articulation and transfer is strong. The processes in place, and the offices charged with addressing such issues, continue to deal with the evolutionary changes that occur. Some of the directions that are anticipated, and plans that the Board of Education and the Board of Higher Education suggest, are explained in this section.

Implications of a Proficiency-based K-16 Educational System. The future of higher education in Oregon (following the lead of K-12 school transformation efforts and the evolution of proficiency-based systems) is heading toward a more universal "proficiency model" for all the educational sectors. The Proficiency-based Admissions Standard System (PASS) being implemented by the Oregon University System ties directly to the K-12 school transformation movement, and, over the next several years, will lead to admission requirements for the public baccalaureate-granting institutions that are based on demonstrated *proficiencies* rather than "seat time" or "Carnegie Units." That is, as Oregon high school students will soon be demonstrating their proficiency in subject matter areas to earn the Certificate of Initial Master (CIM) and the Certificate of Advanced Mastery (CAM), so too will they demonstrate similar proficiencies for entry to college. Many changes are in store for students in all the sectors as these proficiencies become a required part the educational landscape. Three areas requiring attention in order to facilitate this large-scale shift are:

- *Remedial coursework.* At the present time, some students take courses and accumulate credits that are "pre-college" work. Such courses may be taken on a community college campus but the credits are not transferrable to a baccalaureate-granting institution. Sometimes a student attempting (or expecting) to transfer such credits is disappointed that they do *not* transfer. In the new, proficiency-based environment, the expectations will become explicit about what constitutes "college-readiness" in that pre-defined proficiencies will have to be demonstrated. The proficiency model should alleviate one area of confusion in course and credit transfer attempts.

- *Transcripting processes/procedures.* At the present time (as well as historically), high school, community college, and university student educational records are non-standardized. As Oregon moves to alignment of its proficiency standards between K-12 and university-system admissions, standardized transcripting processes and procedures need to be developed by all three educational sectors. Many students view the educational sectors as on one single continuum, without the separations that have been created, and readily move in and among and between campuses on a regular basis. Standardization in the way institutions document student progress is a challenge that should be addressed.

- *Discipline-based problem solving.* Questions about the determination of course equivalency, at least in the present educational environment, stem from concerns about course content. Such issues about courses may arise from lack of communication between and among faculty at the community colleges and the baccalaureate-granting institutions. As proficiency-based systems become increasingly mature in their evolution, the focus will be *more and more* on course *outcomes* rather than in course titles, numbers, and descriptions. Convening meetings of faculty of the 2-year and 4-year sectors, in the same disciplines, in order to discuss items of mutual concern and to agree on what proficiencies need to be demonstrated at a particular level, should lead to greater agreement about course equivalencies. Hence, periodic meetings of faculty groups to discuss issues of mutual concern, and to resolve problems, are anticipated in order to facilitate ease of course and credit transfer.

Communications and Access to Student Information. Ready access to information about individual students is fundamental for efficient and effective course and credit transfer. There are two basic forms of student information: directory information and educational records. Within federal and state mandated parameters, institutions may permit access to directory information (student name, address, telephone numbers, date and place of birth, major field of study, participation in recognized activities, dates of attendance, degrees and awards received, and the most recent previous educational institution attended) subject to specific student requests for suppression of access and restrictions set by institutional policy. Access to educational records (grades, test scores, etc.) by persons or agencies external to an institution is restricted by Federal and State law. Requests for educational records are subject to release by the individual student for specific instances.

The Oregon University System and Oregon Community Colleges will need to work to establish common guidelines for the definition and release of student directory information to accommodate ready access to other educational institutions which have on-going legitimate needs for such information. An example of the appropriate use of directory information would be the identification of community college students in academic programs for universities to contact about transfer opportunities.

In addition, the Oregon Community Colleges and the Oregon University System should seek means permitting institution-to-institution exchange of students' educational records. Such exchanges of student educational records will better enable Oregon community colleges and universities to track transfer students' progress.

Automated course-equivalency and electronic degree-audit system. The proposal to develop a systemwide course-equivalency information system was described earlier in this document (see p. 5). A natural extension to that course-equivalency project would be the eventual development of an automated electronic degree audit system. Such a system would enable transfer students to determine (with much greater precision than is available now) the courses (or competencies) they would still need to complete for a baccalaureate degree. An degree audit system [such as Miami University's Degree Audit Reporting System (DARS)] compares a student's academic work – at any point in the student's career – with the requirements of an institution's academic program or programs, and prepares a comprehensive report detailing the student's progress toward meeting those requirements. Questions that students would be able to answer through using such a system include: What (courses) do I have to take to graduate?" and its corollaries, "Have I met my graduation requirements?" and "What would I still have to take if I switched my major?" The development of such a system would have obvious benefits for *all* students, including those with transfer plans.

Ongoing Data-Collection and Research Efforts. Pervasive themes throughout this report have been "communication" and "information flow." The more information available to students, advisors, counselors, faculty and administrators with respect to the course and credit transfer process, the better the student experience will be. Additionally, the more information that institutions have about student movement, flow, course-taking patterns, and degree-program preferences, the better informed their response can be to students who are seeking their educational goals. Intersector (Oregon University System and Office of Community College Services), collaborative research efforts have been enhanced in the past few years and such activities should be continued and expanded.

Commitment to Regional Partnerships, Co-enrollment/Dual-admission Programs, and other Collaborative Efforts. Oregon's community colleges and university system institutions have made great progress in recent years in working together collaboratively especially in terms of bilateral and trilateral agreements; examples have been documented in this report. The collaborative efforts of the campuses in the postsecondary sectors have made course and credit transfer much easier and a more straightforward, predictable process for students. The campuses of the Oregon University System and the community college system continue to be committed to working together in these ways. One possible avenue that may be available for further exploration is the development of an understanding between the University System and the community colleges that would accommodate a more universal approach to dual admissions and co-enrollment practices.

Appendix

A Brief History of Course and Credit Transfer Accomplishments

This report has documented activity by Oregon University System (OUS) institutions and community college campuses and illustrates a long history of postsecondary-sector collaboration. It has been an operating premise of this report that such activity benefits students by easing their course and credit transfer concerns. Progress on these issues have been particularly significant since 1987, when, using HB 2913 as the impetus, a statewide Associate of Arts degree was agreed upon by the university and community college campuses (see discussion on page 8). Every community college in the State now offers this Associate of Arts/Oregon Transfer (AA/OT) degree which, upon transfer to an OUS, guarantees students with this degree that they have completed the receiving campus' lower-division general education requirements and that they have junior status for registration purposes. The body that monitors the implementation of the transfer degree and other issues related to course and credit transfer and program articulation, is the Joint Boards Articulation Commission (JBAC, see discussion on page 9). Since 1987, the JBAC (and/or its predecessor groups) has noted a list of accomplishments benefitting transfer students in the state of Oregon. This list includes:

- 1988: HB 2913 Committee developed the first AA/OT degree standards – which were subsequently adopted by the Joint Boards of Education
- 1992: Common Course Numbering List published by HB 2913 Committee
- 1992: First study on AA/OT recipient transfer showed 49% transfer rate during study period--twice the national average for students with 12 credits or more in transfer courses
- 1992: JBAC replaced the HB 2913 Committee and the University System/Community College Coordinating Committee
- 1993: Recommended policy and procedure for review of applied academic courses submitted by high schools for use by OUS
- 1993: Update of 1978 Joint Boards Articulation Agreement
- 1994: Professional Technical Course Numbering Policy developed
- 1994: Reaffirmed college credit earned while students are in high school (Dual Credit Courses)
- 1994: Reviewed and revised the Associate of Arts/Oregon Transfer degree standards
- 1995: Reached agreement on data exchange elements and procedures

- 1996: Pilot tested data exchange and made necessary revisions to procedures. Completion of first full study, Fall 1996
- 1996: Encouraged joint faculty development. Meeting with representation from nearly all community college and University System campuses held to plan joint faculty conference on education reform
- 1996: Alignment principles developed for CIM, CAM, PASS and PREP with subsequent approval by Joint Boards of Education
- 1997: Joint OUS-community college faculty conference on educational reform
- 1997: JBAC web site implemented to aid transfer/articulation efforts
- 1997: AA/OT degree reviewed. Letter from JBAC sent to institutional representatives regarding guidelines for practice
- 1998: Update of 1978/1993 Joint Boards Articulation Agreement
- 1998: Revised the Associate of Arts/Oregon Transfer degree standards to include up to 12 credits of professional-technical coursework and to allow the inclusion of WR 115 as an elective

Transfer Student Data

This section briefly summarizes some information available about the scope and nature of student movement, enrollment, and transfer activity in the State of Oregon – and is provided in this Appendix section to illuminate the context in which this plan for course and credit transfer has been developed. These data have been compiled through the Oregon University System (OUS) Institutional Research Services office and the intersector data exchange program of OUS and the Office of Community College Services.

For the class of 1997, of every 100 high school students graduating in the State of Oregon, 67 were enrolled in some form of postsecondary education by winter term of the following year. Of these 67, 25 were at an Oregon 4-year college and 28 were at an Oregon community college. 18 of the 28 enrolled at a community college had plans to transfer to an OUS institution at a later time.

In 1996-97 (the most-recent year for which data have been compiled), 42 percent of all new college transfer students came from Oregon community colleges and 31 percent came from out-of-state colleges (see Table 1).

Table 1
New Admitted OUS Undergraduate Transfers by Educational Source: 1996-97

Other OUS Institutions	787	11%
Oregon Community Colleges	3,049	42%
Other Oregon Colleges	247	3%
Out-of-State Colleges	2,258	31%
Unknown	935	13%
Total	7,276	100%

Source: OUS Institutional Research Services

In 1996-97, of the 2,258 students transferring into OUS institutions from out of state, 1,086 (48 percent) were admitted as residents. All together, these out-of-state students represented 742 different institutions.

Annually, about 3,000 newly admitted undergraduate students transfer to an OUS institution from Oregon community colleges. Of that number, about 500 (17 percent) have earned the Associate of Arts/Oregon Transfer (AA/OT) degree.

Portland Community College, Lane Community College, Mt. Hood Community College, and Chemeketa Community College account for two-thirds (67 percent) of the community college transfer students to OUS institutions (see Table 2)..

Oregon State University, Portland State University, and the University of Oregon receive 83 percent of the community college transfer students each year (see Table 2).

Of the total OUS undergraduate enrollment in 1996, about 17 percent (7,800 students) were Oregon community college transfers. At the time of their admission, about one-fourth had earned an AA/OT degree.

In 1996-97, Oregon community colleges awarded 2,031 AA/OT degrees, continuing a modest upward trend (1,867 in 1994-95; 1,997 in 1995-96). (See Table 3.)

Table 2
New Admitted Undergraduate Transfers from Oregon Community Colleges by Oregon Community College, to OUS Institution
Base and Extended Enrollment,* Academic Year 1996-97

Community College	EOU	OIT	OSU	PSU	SOU	UO	WOU	Total
Blue Mountain	23	1	20	13	3	3	12	75
Central Oregon	5	4	65	18	20	24	7	143
Chemeketa	1	9	133	59	16	41	63	322
Clackamas	0	8	58	113	14	35	13	241
Clatsop	0	2	7	4	2	6	2	23
Lane	0	7	103	32	18	377	5	542
Linn-Benton	0	8	175	23	8	17	14	245
Mount Hood	2	8	56	184	10	40	18	318
Portland	0	37	101	634	23	73	26	894
Rogue	0	13	12	1	68	7	3	104
Southwestern Oregon	0	3	26	3	13	18	2	65
Treasure Valley	10	0	8	1	3	2	5	29
Umpqua	0	11	34	10	11	20	9	95
Total	41	111	798	1,095	209	663	179	3,096

**Excludes non-admitted students and postbaccalaureate non-grads*

Source: OUS Institutional Research Services, 1996-97 ERAN-05 report

Table 3
AA/OT Degrees Awarded by Oregon Community Colleges

Community College	1994-95	1995-96	1996-97
Blue Mountain	95	100	69
Central	151	119	122
Columbia Gorge	15	14	23
Chemeketa	296	277	304
Clackamas	139	197	181
Clatsop	31	26	19
Lane	201	225	218
Linn-Benton	103	92	117
Mt. Hood	232	163	218
Oregon Coast	9	5	28
Portland	274	461	355
Rogue	52	65	85
SW Oregon	62	48	69
Tillamook Bay	8	2	5
Treasure Valley	120	113	139
Umpqua	79	90	79
Total	1,867	1,997	2,031

Source: OUS Institutional Research Services

Of the 14,785 students who attended an Oregon community college in either 1994-95 or 1995-96 AND attended an Oregon University System institution in 1996-97:

- 12,113 were admitted undergraduates (others categories were first professional level, graduate, and non-admitted graduates and undergraduates)

- 7,731 (of the 12,113) were admitted on the basis of their transfer course work (others were admitted on the basis of their high school work or were uncoded)

- 6,035 (of the 7,731) were evaluated on their academic work at Oregon community colleges as the basis for their admission

All the available evidence supports the conclusion that the transfer process for most students in the State of Oregon is a successful one. For example, the average community college transfer student, coming to OUS with an Associate's degree:

- is 26 years old
- earned 95.4 credits at the community college level
- earned a 3.24 cumulative grade point average during their community college experience
- transferred to the OUS institution with 100 credit hours, and
- in their first year as an OUS student, earned 42 credits and a 2.95 grade point average.

The average student transferring with no community college degree:

- is 27 years old
- earned 45.7 credits at the community college level
- earned a 3.12 cumulative grade point average during their community college experience
- transferred to the OUS institution with 70 credit hours, and
- in their first year as an OUS student, earned 51 credits and a 2.88 grade point average.

Thus, with a high level of confidence it has been established that:

- successful community college students become successful OUS students

- by graduation, community college transfers are nearly indistinguishable from native students [identical cumulative grade point averages (3.03) and slightly different total credits at graduation (218 total for community college transfers and 201 total for those admitted as freshmen)].

Attachments

69th OREGON LEGISLATIVE ASSEMBLY–1997 Regular Session

A-Engrossed

House Bill 2387

Ordered by the House March 18
Including House Amendments dated March 18

Sponsored by Representative LUKE

SUMMARY

The following summary is not prepared by the sponsors of the measure and is not a part of the body thereof subject to consideration by the Legislative Assembly. It is an editor's brief statement of the essential features of the measure.

Directs community college district board of education to submit courses to State Board of Higher Education for approval or disapproval of transfer of credit to state institutions of higher education.

A BILL FOR AN ACT

Relating to courses at community colleges; creating new provisions; and amending ORS 341.425.

Be It Enacted by the People of the State of Oregon:

SECTION 1. ORS 341.425 is amended to read:

341.425. (1) Before an educational program is commenced at any community college, the board **of education of a community college district** shall apply to the State Board of Education for permission to commence the program. The application shall be made prior to July 1 of the first year in which courses related to that program are offered and shall include a full statement of the courses offered the first year. After the first year of the program, course additions, deletions or changes must be presented to the State Board **of Education** or a representative of the Office of Community College Services authorized to act for the state board for approval.

(2) Until the community college becomes accredited by the Northwest Association of Schools and Colleges or its successor, the community college shall contract with an accredited community college for its instructional services, including curricula, to ensure its courses carry accreditation and are acceptable for transfer.

(3) After reviewing the contractual agreement between the nonaccredited and the accredited colleges and after suggesting any modifications in the proposed program of studies, the State Board **of Education** shall approve or disapprove the application of a district.

(4) The board of education of a community college district shall:

(a) Follow the plan developed under subsection (5) of this section if the plan is approved by the Legislative Assembly; or

(b) If a plan is not approved by the Legislative Assembly, submit any course that it deems is transferable for credit at state institutions of higher education to the State Board of Higher Education. After reviewing the course, the State Board of Higher Education shall approve or disapprove the transfer of credits to all state institutions of higher education. If the State Board of Higher Education disapproves the transfer of credits, the board shall notify the community college board and suggest modifications so that the course may transfer for credit. If the State Board of Higher Education does not approve or disapprove a course

NOTE: Matter in boldfaced type in an amended section is new; matter *[italic and bracketed]* is existing law to be omitted. New sections are in boldfaced type.

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for transfer of credits within 90 days after the course was submitted, the course shall be considered transferable for credit at all state institutions of higher education.

(5) The State Board of Education and the State Board of Higher Education shall jointly develop a plan for the transfer of credits between community colleges and state institutions of higher education. The boards shall submit the plan to the Legislative Assembly for approval.

SECTION 2. **The State Board of Education and [illegible] State Board of Higher Education shall jointly submit a plan for the transfer of credits between community colleges and the state institutions of higher education to the Legislative Assembly for approval prior to February 1, 1999.**

SECTION 3. **The amendments to ORS 341.425 by section 1 of this Act become operative on July 1, 1999.**

1998 Joint Boards Articulation Agreement

The primary objective of this agreement is the effective delivery of postsecondary educational opportunities to our citizens. The Oregon State Board of Higher Education and the Oregon State Board of Education have mutual interests in serving the educational and continuing education needs of Oregon. In this the Joint Boards are joined by a wide range of other agencies, some public and some private, which have had, and should continue to have, significant roles to play in the future. These include, but are not limited to the following: independent colleges and universities, some federal and state governmental agencies, park and recreation districts, YMCA-YWCA, private career schools, labor unions, the grange, and others.

The Joint Boards believe that efficient use of the educational resources which the above agencies -- public and private -- represent, will require continuing efforts to achieve greater coordination in planning and scheduling of off-campus and distance educational programs and offerings. In the interest of promoting that coordination, certain assumptions and principles should guide the schools, colleges, universities, and other agencies under our jurisdiction in their efforts to serve transferring students and coordinate off-campus and distance education in Oregon.

Assumptions

1. Lifelong learning is necessary for the development of a quality workforce and quality of life in Oregon.

2. The disparate lifelong educational needs of Oregon citizens require that Oregon's educational institutions and agencies offer educational opportunities (including advising services) in a variety of modes, at times and locations that will accommodate the needs of prospective students and that will provide means for students to validate and receive credit for relevant knowledge they possess, irrespective of how or when acquired.

3. Coordination efforts among educational agencies is important to maximizing the state's use of resources.

Principles

1. The Joint Boards affirm their long-standing support of continuing education (credit and non-credit, campus and off-campus) in Oregon.

2. Off-campus education should be seen by the schools, colleges, and universities and other educational agencies under our jurisdiction, as an integral part of their responsibilities to the people of Oregon.

3. New technologies and new configurations (e.g., business/education compacts) will have equal standing to historical arrangements for responding to the challenge of lifelong learning.

4. Oregonians should receive preference in any enrollment management plans developed by colleges and universities under the jurisdiction of the Board of Education or the Board of Higher Education.

Allocation of Primary Responsibility for Off-Campus Education

1. Adult basic education, the development of reading, writing, and computational skills of adults through

the twelfth grade, is the primary responsibility of the community colleges. In areas lying outside community college districts, the local public schools or Education Service District have primary responsibility if no contracted out-of-district (COD) agreement exists with a community college.

2. Lower division academic courses offered off-campus or via distance education technology are the primary responsibility of the community colleges. The role of the independent colleges and universities is acknowledged. Outside community college districts, the Oregon University System (OUS), the community colleges, or independent colleges and universities may share the responsibility of offering lower division courses as may best serve the needs and interests of the area.

Where there are special course needs at the 100- or 200-level, where there are special consortial agreements in place (for example EOU/BMCC/TVCC), or where there are unique associate degree programs, such as those of the Oregon Institute of Technology, OUS institutions may offer such courses or programs as needed, off-campus or via distance education, provided they are not available locally from a community college. In these cases, articulation/information sharing with the community colleges needs to occur prior to scheduling courses to establish common understanding of the need for this OUS programming at the lower division level.

3. Lower division professional/technical courses or programs offered off-campus or via distance education technology are the primary responsibility of the community colleges in regions included within community college districts, except for activities which have historically been within the purview of the Oregon State University Extension Service. The role of the private career schools is acknowledged.

Outside such geographic areas, lower division professional/technical programs and services may be offered by whatever agencies have the resources (e.g., community colleges, OIT, OSU Extension Service). Regional coordination is strongly encouraged.

4. Upper division, graduate, and advanced graduate courses and programs are the primary responsibility of the Oregon University System, a responsibility which it shares with Oregon's independent postsecondary institutions.

5. Responsibility for non-credit courses and activities offered off-campus is to be shared by the agencies under the State Board of Education (community colleges, school districts/community schools, and Education Service Districts) and those of the State Department of Higher Education (continuing education departments and Oregon State University Extension Service). Coordination and close communication at the regional level are encouraged.

Assignment of Other Responsibilities

1. Coordination of degree programs offered through distance technologies will be guided by these principles, will be coordinated at the state level, and when appropriate, at the regional level. The Joint Boards Articulation Commission should ensure that a mechanism for this coordination exists. The Joint Boards should support a common user friendly interface for accessing information such as a single list of courses posted on the ONE (Oregon Network for Education) web site.

2. Block transfer agreements, common course numbering, and other articulation strategies currently in place between OUS and the community colleges should be examined on a regular basis by the Joint Boards Articulation Commission.

3. Any intersegmental issues related to matters under consideration in this statement and affecting the two- and four-year public colleges and universities, or the public schools, which cannot be agreeably resolved by the segments concerned, will be referred to the Joint Boards Articulation Commission for review and recommendations to the Joint Boards.

(Adopted by the Joint Boards of Education, November 20, 1998)

Return to JBAC Home Page

Joint Boards Articulation Commission Page by Jim Arnold

Send mail to Jim Arnold, Director of Community College Articulation, Oregon University System

Send mail to Joint Boards Articulation Commission

Revised: December 23, 1998
URL: http://www.ous.edu/aca/agreement98.html

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Articulation "Hotline" List
Public and Private Colleges and Universities

Institution	Overall Responsibility	Day-to-Day Responsibility	Transfer Credit Evaluators
Bassist College	Michele Dearing 503-228-6528	Raymond Korpi Credentials Evaluator 503-228-6528	Dr. Jane Brown Academic Dean 503-228-6528
Concordia University	Registrar 503-280-8510	Sharon Dunning Asst. Registrar 503-280-8510 Lisa Rishel Asst. Registrar 503-280-8510	
Eastern Oregon University	Pat North Director of Academic Services 541-962-3684	Dea Wells Registrar 503-962-3519	
Eugene Bible College	Clayton Crymes VP for Academic Affairs 541-485-1780	Larry R. Burke Registrar 541-485-1780	Larry R. Burke Registrar 541-485-1780
George Fox University	Andrea Cook VP for Enrollment Services 503-538-8383, x2211	Jim Fleming Registrar 503-538-8383 x 2216	Jim Fleming Registrar 503-538-8383 x 2216
Lewis and Clark College	Anne Price Registrar 503-768-7324 **or** Linda Quandt Admin. Spec 503-768-7332	Anne Price Registrar 503-768-7324 **or** Linda Quandt Admin. Spec 503-768-7332	Aaron G Thomas Asst. Dean of Admissions 503-768-7040
Linfield College	Ken Williams Asst. Registrar 503-434-2200	Cathy Boehlke Transfer Coordinator-Admissions 503-434-2296	Each department does its own for credits within the major. Total and general education requirements are evaluated by the Registrar
Marylhurst College	Cheryl Hollatz-Wisely Asst. VP for Student Services 503-699-6267	Susan Kelton Credit Evaluator 503-699-6268	Susan Kelton Credit Evaluator 503-699-6268
Multnomah Bible College	Joyce Kehoe Registrar 503-255-0332 x 371	Amy Stephens Asst. Registrar 503-255-0332 x 374	

Northwest Christian College	Tracy Sims Registrar 541-684-7217	Tracy Sims Registrar 541-684-7217	Tracy Sims Registrar 541-684-7217
Oregon College of Art and Craft	Julia Reisinger Director of Enrollment Services 503-297-5544 800-390-0632	Julia Reisinger Director of Enrollment Services 503-297-5544 800-390-0632	Julia Reisinger Director of Enrollment Services 503-297-5544 800-390-0632
Oregon Graduate Institute	TBA Registrar 503-690-1028	TBA Registrar 503-690-1028	TBA Registrar 503-690-1028
Oregon Health Sciences University	Victoria Souza Registrar 503-494-7800	Victoria Souza Registrar 503-494-7800	Cathy Saddler Nursing 503-494-7800 Darcy Lewis Graduate 503-494-7800 Judy Grieg Medical 503-494-7800
Oregon Institute of Technology	Teresa Sayler 541-885-1141	Teresa Sayler 541-885-1141	Teresa Sayler Transfer Credit Evaluator 541-885-1154
Oregon State University	Leslie Davis-Burns Dir. Undergraduate Academic Programs 541-737-0729	Michele Sandlin Assoc. Director of Admission and Orientation 541-737-0583	Michele Sandlin Assoc. Director of Admission and Orientation 541-737-0583
Pacific Northwest College of Art	Jenifer DeKalb Registrar 503-226-4391	Jenifer DeKalb Registrar 503-226-4391	Colin Page Admissions 503-226-4391
Pacific University	John Snodgrass Registrar 503-359-2743	John Snodgrass Registrar 503-359-2743	John-Eric Larsen Degree Audit Evaluator 503-359-2743
Portland State University	Janine Allen, Vice Provost 503-725-5249	Agnes Hoffman, Director of Admissions and Records 503-725-5502	Agnes Hoffman, Director of Admissions and Records 503-725-5502
Reed College	Nora McLaughlin, Registrar 503-777-7774	Ben Bradley, Recorder 503-777-7295	Betsy Ellsworth, Asst. Dean of Admissions 503-777-7511
Southern Oregon University	Dr. Sara Hopkins-Powell Provost 541-552-6114	Al Blaszak, Director of Admissions and Records 541-552-6412	Jan Andress 541-552-6413 Ken Royce 541-552-6981 Walter Helgadalen 541-552-6414

University of Oregon	Martha Pitts Director of Admissions 541-346-1289	Helen Garrett Assoc. Director of Admissions 541-346-1285	
University of Portland	Linda Cannard Assoc. Director of Admissions 503-283-7147	Transfer credit evaluator is under dean of school to which student seeks admission.	Dr. Stemler Arts/Science 503-283-7221 Dr. Marti Rhea Business 503-283-7224 Dr. Jane Martin Nursing 503-283-7211 Sister Maria Ciriello Education 503-283-7135 Dr. Zia Yamayee Engineering
Warner Pacific College	John Barber Registrar 503-788-7461	John Barber Registrar 503-788-7461	Evaluations made by registrar under guidance from faculty
Western Baptist College	Rita Wright Registrar 503-375-7014	Rita Wright Registrar 503-375-7014	Rita Wright Registrar **or** Vivian Bain Asst. to the Registrar
Western Conservative Baptist Seminary	Rob Wiggins Registrar 503-233-9561 x 325 503-233-8561	Rob Wiggins Registrar 503-233-9561 x 325	
Western Oregon University	John Brinegar Registrar 503-838-8180	Kathy Brinegar Transfer Records Specialist 503-838-8602	Kathy Brinegar Transfer Records Specialist 503-838-8602
Western States Chiropractic College	Jack Roberts Dean of Student Services 503-251-5707	Admissions: Bob Conners 503-251-5704 Lynn Dassenks 503-251-2812 Charlene Hansen 503-251-5703	
Willamette University	Paul Olsen Registrar 503-370-6206	Marilyn Plenge 503-370-6206	

Return to Instructions Page Community Colleges

Joint Boards Articulation Commission Page by Jim Arnold

Send mail to Jim Arnold, Director of Community College Articulation, Oregon University System

Send mail to Joint Boards Articulation Commission

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Revised: November 2, 1998
URL: http://www.ous.edu/aca/hotlist.html
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ARTICULATION "HOTLINE" LIST

Community Colleges

Institution	**Overall Responsibility**	**Day-to-Day Responsibility**	**Transfer Credit Evaluators**
Blue Mountain CC	Patrick Loughary Dean 541-278-5934	Dana Young Registrar 541-278-5752	Dana Young Registrar 541-278-5752
Central Oregon CC	Registrar 541-383-7261	Marian Chinn Credential Evaluator 541-383-7250	Marian Chinn Credential Evaluator 541-383-7250
Chemeketa CC	Richard Levine VP Academic Services 503-399-5144	Anne Davis Counselor 503-339-6557 Jeri Hunter Registrar 503-399-5001 Maureen Felton Dir., Curriculum Resource Center 503-399-6145	Karen Weiss 503-399-5006
Clackamas CC	Mary Dykes Assoc. Dean of Student Services 503-657-6958 x2425	Mary Bezodis Evaluation Specialist 503-657-6958 x 2264 Brian Mills Evaluation Specialist 503-657-6958 x 2258	Mary Bezodis Evaluation Specialist 503-657-6958 x 2264 Brian Mills Evaluation Specialist 503-657-6958 x 2258
Clatsop CC	David Phillips VP Inst. Programs/Student Services 503-338-2440	Sally Oleson Registrar 503-338-2456	Sally Oleson Registrar 503-338-2456
Columbia Gorge CC	Karen Carter Dir. of Enrollment Services 541-298-3110	Karen Carter Dir. of Enrollment Services 541-298-3110	
Lane CC	Donna Koechig Director of Counseling	Ginger Yamamoto Transfer Specialist 541-726-2204 x 2235	Morgan Soderberg Evaluator
Linn-Benton CC	Patsy Chester Dean, Academic and Administrative Services 541-917-4201	Glenda Tepper Director of Admissions and Records 541-917-4812	Donna James Asst. Director of Admissions 541-917-4812 Each dept. chair evaluates their transfer program requirements.

Mt. Hood CC	Dr. Paul Killpatric Dean of Instructional Services 503-667-7311	Carl Rawe Associate Dean of Enrollment Services 503-667-7368	Peggy Redmond 503-667-7384 Ceri Halverson 503-669-6994
Portland CC	Frost Johnson Director of Enrollment Services 503-614-7800	Sally Croft Records Office Mgr. 503-614-7724	Shirley Knapp 503-614-7719 Jennifer Bowers 503-614-7718
Rogue CC	Galyn Carlile Dean of Academic/Tech Programs 541-471-3500 x 217	Ted Risser Director of Admissions 541-471-3500 x317	Pam Craig Sharon Clark 541-471-3500 x252
Southwestern Oregon CC	Joanna F Blount Assoc. Dean Student Services/Registrar 541-888-7338	Joanna F Blount Assoc. Dean Student Services/Registrar 541-888-7338	Kristi Kohn Transcript Evaluator 541-888-7246
Tillamook Bay CC	Jack Lutes Dir. Student Services 503-842-8222 x135	Jack Lutes Dir. Student Services 503-842-8222 x135 Terrie Miniver Counselor 503-842-8222 x134	TBCC degrees are PCC degrees. We need to meet their requirements.
Treasure Valley CC	Dean of Student Services 541-889-6493 x232	Dean of Student Services 541-889-6493 x232	Dean of Student Services 541-889-6493 x232
Umpqua CC	Larry Shipley Director of Admissions and Records 541-440-4616	Larry Shipley Director of Admissions and Records 541-440-4616	Larry Shipley Director of Admissions and Records 541-440-4616

Return to Instructions Page **Public and Private Colleges and Universities**

Joint Boards Articulation Commission Page by Jim Arnold

Send mail to Jim Arnold, Director of Community College Articulation, Oregon University System

Send mail to Joint Boards Articulation Commission

Revised: November 18, 1998
URL: http://www.ous.edu/aca/cchotlist.html

OSSHE SOLUTION TEAM ON ACCESS, TRANSFER, AND COMMUNITY COLLEGES

October 1997

Executive Summary

The charge to the Solution Team on Access, Transfer, and Community Colleges was to address the principle of a "barrier-free" admission and transfer process to enable students to achieve their academic goals. Partnering with the community colleges to provide baccalaureate capacity and access was also a topic to be explored.

The Solution Team pursued a student-centered agenda in examining policies and practices that would facilitate smoother intersector movement for students. The following five major categories emerged in the course of the Solution Team's deliberations:

1. Credit acceptance between institutions, which is the heart of student concerns;
2. Access strategies for students;
3. The transfer process;
4. Effective communications to the students and among institutions; and
5. The development of comprehensive, collaborative student services.

The challenge for the development of a collaborative system that would enable a "barrier-free admission and transfer system" will be to formalize an infrastructure to lead and maintain coordinated efforts. Under each of the five major areas above, several recommended actions were identified that would support the goals of access, transfer, and collaboration. The priorities include:

1. Credit acceptance practices should continue to be reviewed. Guidelines for acceptance of credit for prior learning should be established. Additionally, the Joint Boards Articulation Commission (JBAC) should examine the problems associated with professional/technical courses regarding transferability and student expectations. Finally, various alternative modes of earning credit such as advanced placement, college high, accelerated baccalaureate, and other "early options" should be jointly developed by an intersector group.

2. Student access strategies should include continued support for the intersector Web site ("ONE") to facilitate the delivery of information to students. In addition, the development of a centralized repository for catalog and schedule information for the community colleges and OSSHE institutions would be desirable. Considerable resources would be needed for this initiative, however.

3. Transfer articulation information for students should be facilitated through an "Articulation and Transfer Forum." The currently-published Articulation Hotline List has been maintained through JBAC efforts. This document contains the names, institutional affiliations, and phone numbers of appropriate contact people on

community college and OSSHE campuses. However, information regarding programs and courses could be communicated more effectively and in a more timely manner. An electronic discussion group ("Articulation and Transfer Forum") should be established for the dissemination of this information.

4. Communication between OSSHE and the community college sector should be enhanced and supported. A statewide faculty conference on proficiency-based education last spring should be followed with additional conference opportunities. The OSSHE Director of Community College Articulation should coordinate closely with the Office of Community College Services in order to facilitate intersector communications and special projects for collaboration.

5. Comprehensive, collaborative student services should be available to students. Effective and innovative financial aid practices and co-admission policies should be inventoried, and model agreements for services should be developed. This information should be widely distributed to community college and OSSHE partners.

Introduction

This document, presented in six major sections, is the final report of the OSSHE Solution Team on Access, Transfer, and Community Colleges. This first (introductory) section describes (1) the formation of this Solution Team; (2) the charge that guided group deliberations; (3) the major issues initially identified by the group; and (4) a description of other groups working on these issues. The following five sections outline the priority policy issues discussed as well as the recommendations that emerged in some of the areas. The broad policy areas addressed are (A) credit acceptance; (B) student access strategies; (C) transfer; (D) communications; and (E) comprehensive/collaborative student services.

Solution Team Formation and Its Charge

The OSSHE Solution Team on Access, Transfer, and Community Colleges emerged as one of 17 such groups in the third phase of the State System's strategic planning initiative launched in 1995. (Solution Team members are listed at the conclusion of the Report.) The charge from the Chancellor and the Board to this Solution Team was to:

> Develop a barrier-free admission and transfer process to enable students to achieve their academic goals. Partner with the community colleges to provide baccalaureate capacity and access.

From the beginning, the Solution Team focused on students and worked toward recommendations to facilitate smoother intersector movement by minimizing unnecessary barriers.

Solution Team Meetings and Group Process

The Solution Team met several times between October 1996 and April 1997 to identify and discuss the range of issues most relevant to its charge. After identifying the problems, issues were prioritized, other groups working on the same issues were consulted, and final recommendations were developed.

Major Issues

An interim report of this Solution Team was presented to the Board in October 1996. At that time, the Solution Team reported the following needs:

1. The need for consistent understanding about the standards and assessment processes for proficiency-based education, namely the CIM and CAM (K-12), PREP (community colleges), and PASS (OSSHE);

2. The need for understanding the changing educational environment whereby students move in and out of institutions and/or enroll simultaneously in two or more community colleges and/or baccalaureate-granting institutions;

3. The need for "academic maps" so students can more easily acquire information for planning careers and accessing appropriate academic programs;

4. The need for student support services, which can be effectively linked between and among all institutions, both secondary and postsecondary;

5. The need for faculty to work more cooperatively in the development of curriculum and strategies for assessment. Among other needs are the creation and sharing of professional development opportunities for faculty;

6. The need for school-to-work articulation plans; and

7. The need to promote the development and implementation of accountability mechanisms for learning experiences outside the traditional classroom setting.

Related Groups Addressing the Issues Examined by the Solution Team

A variety of other groups have been kept informed about this Solution Team's activities and their input has been actively solicited. Among these groups are the OSSHE Academic Council, the community college Council of Instructional Administrators (CIA), the Joint Boards Articulation Commission (JBAC), and the JBAC's Student Transfer Committee. The Solution Team has inventoried the works in progress of these other groups and integrated recommendations from them into the policy recommendations found in the following sections of this report. The Solution Team developed a formal relationship with the JBAC, being adopted by that body as an ad hoc subcommittee.

Discussion of Issues and Recommendations

The Solution Team — a diverse group of community college, OSSHE, K-12, independent college, and private sector representatives — utilized an iterative process to identify problematic areas, prioritize the issues, and develop thematic areas for policy recommendations. In both large- and small-group settings, Solution Team members brainstormed ideas, generated successive lists of issues, and revised those lists as discussion generated and illuminated more ideas. The five sections ("A" though "E") outline the areas that dominated discussion. Within each of the five major categories, sub-topics are listed and explained. In this report, the goal of the Team was to keep the description of these topics concise, to address which general policy directions may be desirable, and to identify, where possible, the resources to follow up on our recommendations.

A. Credit Acceptance

The theme of credit acceptance goes to the heart of transfer student concerns. The question students ask is: "Will the credits earned at one institution be accepted at my transfer institution?" This topic merited much discussion at Solution Team meetings. Some of the details of this theme are discussed below.

- Credit for Prior Learning

Discussion: Granting academic credit for prior experiential learning is recognized by the Commission on Colleges, Northwest Association of Schools and Colleges, and guidelines for granting such credit appears in the *Accreditation Handbook*. Policies and procedures must be documented and monitored by institutions. Several institutions currently offer credit for prior learning, though the credits earned at one institution do not necessarily transfer to another. The Solution Team engaged in considerable discussion about whether OSSHE and the community college system should work toward common guidelines in this area. In general, members accepted the practice of granting prior learning credit, but divergent views were expressed about transferability. The Solution Team agreed that there is need to seek common ground through proficiency-based outcomes.

Recommendation(s): The Solution Team recommends that the chief academic officers of the community colleges, OSSHE institutions, and a representative from the independent colleges work on guidelines for documenting experiential learning as it relates to student transfer. The JBAC has also included this issue as part of their work plan.

- Professional/Technical Courses

Discussion: Professional/technical courses (previously known as vocational/technical) have become a major issue of contention in the arena of credit acceptance. Historically, professional/technical courses are generally not considered transfer courses, but the lines between what is "legitimate" as a transfer course and what is "not legitimate" have become blurred. For example, many community colleges have implemented the practice of numbering professional/technical courses with an alphanumeric designation (moving away from the old decimal numbering system).The alphanumeric system had previously been utilized only for transfer courses and this change in course numbering has resulted in confusion. Further, the definitions of what courses are "academic" (transfer) and what are "professional/technical" (non-transfer) have become less obvious in some fields. For example, some computer courses offered at community colleges have typically been thought to be professional/technical, but in recent years some have moved more into the realm of true "academic," transfer courses. Finally, one community college has allowed for the inclusion of limited professional/technical courses into the Associate of Arts/Oregon Transfer degree it offers, which then tempts a receiving OSSHE institution to "deconstruct" a student's transfer degree (disallowing some/all of the professional/technical courses from that college). The result is the transfer of less than the full 90 credit hours, which should make up the block transfer.

A specific plan that has been proposed in some quarters to address the acceptance of professional/technical courses is the adoption of a policy whereby *all* lower-division collegiate and selected professional/technical community college courses are accepted for transfer. Movement toward such a policy would likely be controversial, however. An alternative policy direction that might be considered is one that would call for: (a) all courses that Oregon community colleges designate as transfer courses be reflected in student documents/transcripts; (b) clarity about if and how credits transfer to each OSSHE institution be achieved, documented, and routinely updated; and (c) OSSHE institutions work toward common practices. Implementation of these or similar policies would avoid problems with determinations of what is transferable and what is not, maximize student expectations with regard to transfer of credits, and place the focus at the baccalaureate level on what still needs to be completed for the degree.

Recommendation(s): As reported to the Joint Boards of Education in September 1997, the JBAC has been examining the issue of professional/technical courses for the past year. The plan for the JBAC is to continue to monitor issues that remain problematic in this area. The Solution Team concurs with the JBAC direction.

- Advanced Placement, College High, Accelerated Baccalaureate, and Other "Early Options"

Discussion: Various alternative modes of credit earning were discussed in terms of the implications for students (primarily high school students) who wish to have prior college credit accepted by postsecondary institutions. Oregon has no coherent policy or plan relating to expanding opportunities to students through so-called early options programs. Individual students learn of, and decide on their own about, pursuing such courses of study. Credit acceptance does not always take place in such instances and, when it does, there may be no real advantage to students in terms of time-to-degree. Coincident with the deliberations of the Solution Team was the passage of SB 919 by the 1997 Legislature, which calls upon the State System to "continue experimentation with and implementation of various accelerated baccalaureate degree models ...[which] may include but need not be limited to early entry and postsecondary options and models that are jointly developed with the State Board of Education."

Recommendation(s): At the September 1997 meeting of the Joint Boards of Education, a plan was approved for a study of early options programs. The Solution Team suggests that the intersector group designing this study prepare data-driven recommendations at the conclusion of their work.

B. Student Access Strategies

An important element of the charge to the Solution Team was to consider a "barrier-free admission and transfer process." This led the Solution Team to consider the general topic of student access in a variety of ways.

- Web Site (Oregon Network for Education [ONE])

Discussion: During the time of the Solution Team's deliberations, it was agreed that a common Web site for all educational sectors should be established so that students, prospective students, and all others, would have a "one-stop shopping center" on the Internet for Oregon's educational resources. This proposal was endorsed by the Joint Boards of Education at their November 1996 meeting, and was envisioned to include links to a host of Web resources in the state for the K-12, community college, and higher education sectors. Such a Web site was developed and implemented in the summer of 1997 (http://www.osshe.edu/one/), primarily through the efforts of the OSSHE Office of Academic Affairs.

Recommendation(s): The Solution Team applauds the efforts to implement this Web site and endorses its continuation and growth. Additional resources should be directed toward this project to develop a common course catalog and class schedule database (see below).

- Enhanced Access to Courses and Information: Statewide Catalog

Discussion: At the present time, students desiring course descriptions, schedules, and availability must search individual college catalogs and schedules of classes (in print and/or electronic versions) for the information they need. A central repository of this information, for both the community colleges and the OSSHE universities, seems desirable.

Recommendation(s): A statewide database of course information is seen as an important objective by the Solution Team, most likely as part of the ONE Web site.

Resources needed for such a project would be considerable, however, and whether or not to make securing such resources a priority in the budget requests for the next legislative session merits close examination by the Board.

- Coordinated Delivery of Distance Education

Discussion: It is essential that OSSHE campuses and community colleges coordinate the delivery of distance education programs and courses in order to maximize accessibility for students. Many campuses are providing online courses in a variety of disciplines. These courses could be shared in degree programs provided by several institutions. The coordination for degree-building distance-delivered courses could be facilitated through ONE or a similar entity.

Recommendation(s): The Solution Team encourages a statewide effort to improve telecommunications capabilities for education and establish a designated budget. Further, the Solution Team recommends that distance education opportunities be inventoried, developed, and supported through a collaborative infrastructure.

C. Transfer

Related to the theme of "transfer," the Solution Team examined the following issues.

- Articulation Hotline List

Discussion: Up-to-date information must be readily available to students, counselors, advisors, and admissions staff when attempting to resolve issues regarding student transfer. "Who to talk to?" is a very important question. An "Articulation Hotline List" with the names, institutional affiliations, and phone numbers of the appropriate contact people on the state's two-year and four-year campuses has been available as an important resource for those having transfer questions. In the last year, the JBAC has undertaken the task of updating this list, distributing it widely, and posting it to its Web site.

Recommendation(s): The Solution Team endorses the "Articulation Hotline List" as a meaningful resource and suggests that the JBAC continue updating and distributing it regularly.

- Develop Proficiency-based Transfer Vehicles

Discussion: The implementation of a proficiency-based system for OSSHE admissions (PASS) necessitates thinking about the impact of this process on student transfer. The implementation of PREP (PRoficiencies for Entry into Programs) for community colleges applies to entry to individual programs on each campus and does not translate into action regarding OSSHE proficiency standards. The JBAC has this issue on its work plan for examination, especially as it applies to the Associate of Arts/Oregon Transfer degree.

Recommendation(s): The Solution Team recommends that this issue be considered by the JBAC at the time it deems appropriate.

D. Communication

An issue that repeatedly surfaces with respect to facilitating articulation and effective student transfer is *communication*: more information communicated in a more timely matter is critical.

- Chancellor's Office Liaison with Community Colleges

Discussion: In keeping with the theme of communication between OSSHE and the community college sector, the Solution Team was pleased to learn that, early in 1997, the OSSHE Office of Academic Affairs created a position entitled "Director of Community College Articulation." Jim Arnold, previously Assistant to the Vice Chancellor for Academic Affairs, was appointed to that position and has served since then as an ex-officio member of the Solution Team.

- Hotline Listserv

Discussion: Institutions from both postsecondary sectors agree that information regarding changes in programs and courses could, and should, be transmitted more effectively than happens at the present time. Currently there exists an "Articulation Hotline" list (in print and electronic/Web versions, see above) that contains the names, institutional affiliations, and phone numbers of the appropriate individuals on each campus who handle articulation and transfer issues. This information may be used by either staff or students when attempting to resolve a transfer issue. It is believed that more effective communication is desirable and possible.

Recommendation(s): An "articulation and transfer" electronic communications network (e.g., a listserv, perhaps with a title along the lines of "Articulation and Transfer Forum") should be implemented so that interested staff could subscribe to and post the latest developments on their campuses for others to take note of and react to. The OSSHE Office of Academic Affairs, specifically under the direction of the Director of Community College Articulation, should take the lead on this recommendation -- and should coordinate closely with the Office of Community College Services.

- Academic Council (OSSHE)/Chief Academic Officer (CC) Meetings

Discussion: Many of the issues pertaining to articulation and transfer are closely linked with curricula; the academic officers of the community colleges and OSSHE institutions are directly affected by changes in policy regarding transfer and articulation and should be involved in policy development and implementation. Regular dialog between the academic officers of the two sectors would seem to be healthy in maintaining relationships and facilitating communication regarding changes in programs, courses, and institutional philosophies and cultures.

Recommendation(s): The Solution Team encourages the continuation of regular joint meetings between the academic officers of the two sectors. (Note: One such meeting is scheduled on October 16, 1997, at OIT.)

- Faculty Discipline Meetings

Discussion: This issue parallels the need for communication at the senior academic officer level. Transfer issues and problems can be the result of miscommunication, lack of communication, or lack of understanding of the programs and courses offered by "the *other* sector." If faculty members from the same discipline at the community colleges and OSSHE institutions can meet from time to time, working relationships can begin and/or be enhanced. With faculty members developing understanding and trust, students involved in the transfer process will benefit. One recent example of effective faculty-to-faculty interaction and dialog was the statewide conference on proficiency systems, hosted by OSSHE in Eugene in May 1997, and attended by faculty members representing all OSSHE and community college campuses. This highly-rated event generated much awareness on the part of faculty regarding ongoing changes toward proficiency-based models of education and gave everyone an opportunity to meet and begin to develop working relationships.

Recommendation(s): Department chairs, deans, and senior academic officers at OSSHE institutions and community college campuses should create and encourage additional opportunities for intersector faculty meetings.

- Inventory of Partnerships and Compilation of Data Profiling Student Progress

Discussion: The Solution Team believes that it would be valuable to compile an inventory of partnerships currently in existence between OSSHE institutions and community colleges to serve as a repository of success models to facilitate more effective transfer and articulation efforts. Furthermore, the Solution Team expressed a desire that data systems could/should be developed/enhanced to enable the sectors to profile student movement through the sectors. The creation and continuation of central information sources upon which those involved in articulation and transfer could draw would assist more effective communication efforts.

Recommendation(s): The Solution Team endorses and recommends the continuation of the Intersector Data Exchange efforts (a cooperative program to share data about students) initiated by OSSHE and the Office of Community College Services. The integration of various databases of these offices in the past two years has allowed the

JBAC to examine much more information than was previously available. The development of an inventory of partnerships, and expanding the database exchange and development efforts, would require additional resources to implement. The consideration of a budget request in this area may be appropriate.

E. Comprehensive, Collaborative Student Services

A major issue is how to be responsive to students who move in and out of institutions and/or enroll simultaneously on two or more campuses. In this age where many students effectively view *all* of postsecondary education as a "system," an optimum learning environment should include student support services that are linked effectively between institutions. Students need appropriate advising, career guidance, and an opportunity to acquire academic and financial planning/advising that supports a "seamless" transition between institutions.

- Support Advisors and Counselors

Discussion: Advisors and counselors need to have current information about articulation agreements and programs at all the institutions in order to provide optimum advising services to students. Counselors and academic advisors need to have ready access to information and contact persons. This can be accomplished through electronic media, including the Web and electronic mail groups.

Recommendation(s): The Solution Team recommends that the JBAC encourage the networking of counselors and advisors, and supports the efforts of the OSSHE Office of Academic Affairs in sponsoring an annual conference for community college advisors and counselors to discuss transfer issues.

- "Seamlessness of Services" (especially financial aid)

Discussion: The major student service that merits ongoing review is financial aid. This area presents many challenges in terms of meeting the federal regulations, while following accreditation policies and providing optimum student services. The Solution Team discussed developing co-admission processes, including procedures for transferring tuition and financial aid between campuses.

Recommendation(s): The Solution Team recommends that community colleges and four-year institutions develop partnership models to include seamless student services, specifically addressing the areas of tuition and financial aid for students who are concurrently enrolled.

- Co-Admission Task Force

Discussion: Several community college/university partnerships are in place (or are developing) to facilitate movement of students between institutions. The strategies include developing co-admission agreements to provide coordinated student and academic services for jointly enrolled students. Consortium agreements for federal financial aid disbursement, library services, advising services, and mutual faculty development opportunities are being completed among several partners for the academic year. In addition, coordinated outreach and orientation efforts are being planned. Several pilot partnerships are currently being developed with funding from the Regional Access Initiative.

Recommendation(s): The Solution Team recommends a "Co-Admission Task Force" be established, with representatives from several community colleges and four-year institutions, to develop common guidelines for dual admission. This task force would also share information in order to provide models for other partnerships.

Conclusion

This report has described the work of the Solution Team over the past year, has discussed many issues covered in the deliberations, and, finally, made several recommendations. As the work of this body comes to a close, we acknowledge that there is much left to do to make the educational sectors more "seamless." Articulation efforts and agreements between OSSHE institutions and community colleges need to continue — and we must continue to seek to make the transfer process easier for students. Students are, after all, what we are about — and the Solution Team continually reminded itself of this student focus during its deliberations. This report is issued as OSSHE, the community colleges, the Joint Boards of Education, and the JBAC, develop a response to HB 2387 passed by the 1997 Legislature. This legislation calls for the development of a "plan for the transfer of credits between community colleges and the state institutions of higher education," that must be submitted to the next legislative session for approval prior to February 1, 1999. If the legislature does not approve the plan so developed, a plan of action has been spelled out for us. To adequately address the concerns of the legislature, and to facilitate ongoing articulation and transfer efforts, we believe the recommendations made here will provide some guidance. Many Solution Team members continue to represent the interests of the Team, of students, and of the Board of Higher Education by remaining as members of the Joint Boards Articulation Commission, charged by the Joint Boards to coordinate the writing of the plan for the 1999 legislative session.

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Oregon
University
System

Transfer and Articulation: A Status Report with Recommendations for Board Policy and Strategic Action

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Introduction

What do we know about transfer and articulation? First, that they're not the same thing. Transfer is defined as the process for reviewing and admitting applicants to undergraduate programs who have previous college work.[1] Articulation is the process whereby two or more institutions align courses and/or programs. Second, these are not just Oregon issues, but are receiving widespread national attention. According to a 1996 report by the National Center for Education Statistics, only about 37 percent of the students who earn a baccalaureate degree do so from the school at which they first matriculated. Third, student movement between and among institutions is not necessarily linear (e.g., two years at a community college followed by two years at a university). Several recent studies document the multiple patterns of student movement in their pursuit of higher education (e.g., Kearney et al., at a large public Midwestern university, 1995; Kinnick et al., at PSU, 1997). Fourth, an increasing array of postsecondary educational providers and delivery modes further challenges our ability to provide for the smooth movement of students through their postsecondary experience. And, finally, educational reform (both nationally and in Oregon) and higher expectations by prospective employers are moving higher education away from traditional evaluation by course credits and contact hours to evaluation based on proficiency and specific outcomes.

Direction of State Leadership

The Oregon State Board of Higher Education, Governor Kitzhaber, and the Oregon Legislature have all targeted improved transfer and articulation as key educational priorities. Following is a summary of recent actions.

Board of Higher Education. In late 1996, the Board formed a Solution Team on Access, Transfer, and Community Colleges. As part of its Systemwide strategic planning, it was charged with developing a barrier-free admission and transfer process to enable students to achieve their academic goals, and partnering with the community colleges to provide baccalaureate capacity and access. The Solution Team recommended action in several areas: credit acceptance; student access strategies; transfer; communication; and comprehensive, collaborative students services.

Governor Kitzhaber. The Governor's Task Force on Higher Education and the Economy report (12/97) encouraged "all Oregon institutions of higher learning to form alliances to serve the needs of Oregon learners." The Governor's Task Force on College Access report (8/97) called for a "level of transfer much more general than that offered by the Associate of Arts/Oregon Transfer degree" (AA/OT); a Web site and toll-free phone number to increase communication; and transfer agreements. In December 1997, Governor Kitzhaber reiterated to the Board his strong commitment to higher education access, stating that no Oregonian should be "left out by reason of geography, economic, racial or ethnic background, time constraints, or avoidable logistical problems." His goal is to achieve "complete program transferability among community colleges and universities, as well as facilitating transferability issues with private and out-of-state schools."

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[1] OUS transfer students must have completed a minimum of 24-36 credits of acceptable college-level work. The hours required vary among institutions. (Students with fewer college credits are admitted as first-time freshmen. This does not mean their incoming credits are not accepted.)

Oregon Legislature. During the last legislative session, two bills in particular address the need for intersector progress toward solving transfer and articulation problems. HB 2387 directs the Board of Education and the Board of Higher Education to "jointly develop a plan for the transfer of credits between community colleges and state institutions of higher education" and to submit this plan for approval at the next legislative session. SB 919 directs the two boards "to develop policies and procedures that ensure maximum transfer of credits between community colleges and state institutions of higher education."

The Oregon Context

Current Perspective. Myriad postsecondary educational choices currently exist, creating a staggering number of possible educational pathways for students. OUS and its partners need to be prepared to receive these students. In 1995-96, there were 3,706 postsecondary education institutions in the United States (Andersen, 1997). OUS currently offers 321 baccalaureate degree programs. In 1996-97, more than 3,000 new students were admitted to OUS undergraduate programs from Oregon community colleges alone, and an additional 2,258 students were admitted from 742 different out-of-state institutions.

OUS and its partners have tackled transfer and articulation problems through a number of avenues. Among the most notable are the AA/OT degree; common course numbering; the development of comprehensive course equivalency tables that are accessible on the Web; the K-16 Web page "ONE"; and numerous OUS-community college partnership arrangements, such as the University Center in Bend.

Issues regarding credit transfer continue to be at the heart of higher education's challenge. Non-application of credit may occur for any number of reasons, such as:

- the receiving institution limits the number of professional-technical courses it accepts;
- the course in question is college preparatory (i.e., remedial);
- the credit was granted on the basis of prior learning (experiential) and not considered equivalent to offerings at the receiving institution;
- the course was taken at a nonaccredited institution; or
- the student received an unsatisfactory grade.

Realistically, some problems will always be beyond the ability of higher education to address (e.g., additional coursework required due to a student changing his/her major).

Future Perspective. Education is changing, throughout the nation and in Oregon. As a result, the articulation/transfer picture is growing in both scope and complexity. Some important elements of the new context follow.

- As more out-of-state providers enter the Oregon educational market, placebound students will be able to "attend" non-Oregon institutions. Electronically delivered coursework will provide time-bound and placebound students with more educational opportunities from a variety of providers. As a result, student transcripts for transfer will become more varied and complicated.

- One of the biggest changes underway in education in the nation is the concerted move to outcomes-based education. Educational sectors are being asked to define learning goals, standards, and outcomes of courses, programs, and degrees.

- The educational emphasis on outcomes extends to performance indicators approved by the Board (11/97). An access indicator calls for measuring the effectiveness of transfer programs (e.g., the proportion of transfers of total enrollment, the graduation rate of transfer students) and will produce data to track the progress made.

- Students no longer move lockstep through a predetermined high school curriculum, but have opportunities for more individualized and accelerated academic programs. Articulation strategies such as co-enrollment and early admission will demand increased attention from higher education providers.

- Public accountability and "customer" expectations will continue to grow in importance in this state, as elsewhere. Oregonians want to see evidence that the public sector exhibits a market orientation and works effectively with other sectors in providing students a rich array of programs and services.

Next Steps

Although the scope and complexity of transfer and articulation issues are daunting, OUS and its partners are resolved to create the most seamless process possible. Changes in the future context — and others yet to be identified — suggest that transfer and articulation initiatives need to foster a "co-evolving" of the educational sectors and economy to meet the needs of higher education's varied customers. The following proposed policy and strategic actions affirm the System's commitment to advance transfer and articulation initiatives within current and emerging contexts, with an emphasis on relationships between OUS and the community colleges.

Policy and Principles

The goal of the Oregon State Board of Higher Education is for Oregonians to have maximum academic program articulation and transferability.

To that end, the Board endorses the following assumptions and guiding principles:

1. Responsibility for successful student transfer and articulation is shared among OUS, community colleges, K-12, students, and independent and other educational providers; cooperation and collaboration are essential.

2. Broad curricular diversity among the OUS institutions and community colleges creates a dynamic tension when trying to resolve problems of articulation.

3. OUS institutions, as well as intersector groups (e.g., Joint Boards Articulation Commission) are actively addressing problems that arise in transfer and articulation processes.

4. Communication is fundamental, both among educational providers and with students.

5. Transfer and articulation agreements may be constructed at many levels (e.g., system to system, institution to institution, program to program) and for any number of reasons (e.g., regional partnerships, workforce needs).

6. Transfer and articulation initiatives must be structured enough to guide action, yet flexible enough to allow for student, societal, and educational change and evolution.

7. Initiatives should be informed by sound research.

8. Initiatives should reflect the increasing move by all levels and sectors of education to outcomes- and proficiency-based learning and admissions processes.

9. Transfer and articulation initiatives are not limited to curricular alignment alone and, consequently, should be responsive to student service needs (e.g., timely and accurate advising, financial aid).

Strategic Actions

To implement the policy and principles, the Board of Higher Education directs the Chancellor's Office and the System campuses to take specific action in the following areas:

1. *Co-admission/co-enrollment programs.* Develop additional co-admission and co-enrollment programs for eligible students who begin their postsecondary education on community college campuses and who plan to complete their baccalaureate program at the partnering OUS institution. By enabling timely relationships with students through such programs, degree completion has a better chance of success.

2. *Articulation agreements.* Support the development of articulation agreements between individual institutions within the array of educational service providers in the state. As the explosion of distance education, alternative format, and Web-based courses and programs from multiple educational service providers continues, formalized arrangements will facilitate an orderly flow of students from campus to campus. The new major regional partnerships have strong potential for meeting educational access needs.

3. *Additional block transfer degree.* Work with the community colleges to develop a block transfer Associate of Science (AS) degree that would better fit students whose goals are to transfer to OUS programs in the sciences, health sciences, engineering,

and other technical fields (and where the current AA/OT degree does not align with the baccalaureate major requirements).

4. *Baccalaureate degree outcomes.* Establish the learning outcomes expected of a student graduating with a baccalaureate degree. Ease of transfer should eventually result if the focus is on the learning outcomes a student is able to demonstrate, rather than the course credits accumulated. Building on the work of PASS and other outcomes-based initiatives, a Systemwide task force, with participation from the community colleges, will be charged with identifying baccalaureate degree outcomes and their application to the transfer process.

5. *Course equivalency information systems.*
   - Uniformly compile, regularly update, and widely distribute information regarding course equivalencies (between OUS institution courses and community college courses). System institutions presently lacking this capability should make it a priority for the next admission cycle. Publishing information on the World Wide Web, with a user-friendly interface, is the preferred distribution method. Contact persons at each institution should be identified for students, advisors, counselors, or others needing assistance in finding and interpreting the equivalency information as published.

   - At the System level, a standard course-equivalency information system should be created that builds on the efforts already in place at the campus level. Such a comprehensive data system would enable students and advisors to determine the relationship between all community college courses and similar courses offered at OUS institutions. Resources to accomplish this strategic action should be sought.

6. *Discipline-based problem solving.* Convene and conduct periodic meetings among faculty in the same disciplines in community colleges and OUS institutions to discuss issues of mutual concern and to resolve problems. The Joint Boards Articulation Commission (JBAC), the Academic Council (OUS), and/or the Council of Instructional Administrators (community colleges) should sponsor such faculty forums. For example, faculty must resolve transfer issues related to similar (or the same) courses offered at the upper-division level in OUS institutions that are offered at the lower-division level in community colleges. Resolutions are required that do not disadvantage (e.g., with respect to upper-division credit requirements) transfer students who have earned credits in the community college courses.

7. *Professional-technical courses.* Reach agreement between OUS institutions and the community colleges about how professional-technical courses and programs are defined and then operationalize transfer policies and procedures consistent with those definitions. Further, expand institutional policies and practices that facilitate student transfer from professional-technical programs into compatible and/or complementary baccalaureate programs.

8. *Research agenda.* Establish a focused research agenda to inform the transfer and articulation policy agenda, and current and future strategic directions. Examples of

such research questions should include (but are not limited to) : (1) What happens to the large number of AA/OT graduates who apparently do *not* transfer to an OUS institution? (2) What are the highest-demand programs for students transferring into OUS institutions? (3) How much time do students transferring in with an AA/OT, and/or other associate degree take to earn a baccalaureate degree? (4) What are the comparative success rates of students with different patterns of pursuits of the baccalaureate degree?

9. *Institutional responsibilities.* Recognize that every institution bears an administrative responsibility for implementation and oversight of matters affecting transfer students. Each campus should review its capacity to respond to student problems and concerns, and make improvements as needed. (The Web-based JBAC Articulation Hotline provides links to the campus contacts who are responsible for transfer student issues.)

10. *Communication, course sharing, and articulation.* Develop, in cooperation with the ONE (Oregon Network for Education) project, a Web-based common college catalog of distance education courses available from Oregon and partner institutions. Establish a "Common Course Marketplace" comprised of those distance education courses for which credit would be accepted at any participating Oregon institution. Resources to accomplish this strategic action should be sought.

11. *Early options programs.* Develop, with the Joint Boards, policies that support new and/or expanded partnerships among OUS, community colleges, and high schools to better serve "college-ready" high school students in early college programs and expedite student progress toward a college degree.

12. *Intrasystem transfer issues.* Resolve "internal" (OUS institution to OUS institution) programmatic transfer issues. For example, students transferring upper-division credits from a System program that is not professionally accredited are sometimes required to repeat courses when moving to a program that *is* professionally accredited. Professionally accredited programs should work with "sending" programs to develop learning outcome-based ways to assure that transfer credits meet the specifications of their curriculum. Where this is unacceptable to accreditation groups, work to accommodate the demonstrated learning outcomes of transfer students.

13. *Intersector transfer plan.* Work with the JBAC and its action teams to respond to the requirements of HB 2387, presenting an effective intersector transfer plan to the 1999 Legislature.

Staff Recommendation to the Board

Staff recommends that the Board adopt the proposed policy, guiding principles, and strategic actions on transfer and articulation. In addition, staff recommends the Board direct staff to work with campuses to establish timelines for implementation of these strategic actions, and report annually on progress made on student transfer and articulation issues.

Transfer Student Data

The following data further illuminate the context in which this policy document has been developed.

- In 1996-97, 42 percent of all new college transfer students came from Oregon community colleges and 31 percent came from out-of-state colleges (see Table 1).
- Of the 2,258 students transferring into OUS institutions from out of state in 1996-97, 1,086 (48 percent) were admitted as residents. All together, these students came from 742 different institutions.
- Annually, about 3,000 newly admitted undergraduate students transfer to an OUS institution from Oregon community colleges. Of that number, about 500 (17 percent) have earned the AA/OT degree.

Table 1
New Admitted OUS Undergraduate Transfers
by Educational Source: 1996-97

Other OUS Institutions	787	11%
Oregon Community Colleges	3,049	42%
Other Oregon Colleges	247	3%
Out-of-State Colleges	2,258	31%
Unknown	935	13%
Total	7,276	100%

Source: OUS Institutional Research Services

- Portland Community College, Lane Community College, Mt. Hood Community College, and Chemeketa Community College account for two-thirds (67 percent) of the community college transfer students to OUS institutions (see Table 2).
- OSU, PSU, and UO receive 83 percent of the community college transfer students each year (see Table 2).
- Of the total OUS undergraduate enrollment in 1996, about 17 percent (7,800 students) were Oregon community college transfers. At the time of their admission, about one-fourth had earned an AA/OT.
- In 1996-97, Oregon community colleges awarded 2,031 AA/OT degrees, up from the previous two years (1,867 in 1994-95; 1,781 in 1995-96). (See Table 3.)

Table 2
New Admitted Undergraduate Transfers from Oregon Community Colleges by Oregon Community College, to OUS Institution Base and Extended Enrollment,* Academic Year 1996-97

Community College	EOU	OIT	OSU	PSU	SOU	UO	WOU	Total
Blue Mountain	23	1	20	13	3	3	12	75
Central Oregon	5	4	65	18	20	24	7	143
Chemeketa	1	9	133	59	16	41	63	322
Clackamas	0	8	58	113	14	35	13	241
Clatsop	0	2	7	4	2	6	2	23
Lane	0	7	103	32	18	377	5	542
Linn-Benton	0	8	175	23	8	17	14	245
Mount Hood	2	8	56	184	10	40	18	318
Portland	0	37	101	634	23	73	26	894
Rogue	0	13	12	1	68	7	3	104
Southwestern Oregon	0	3	26	3	13	18	2	65
Treasure Valley	10	0	8	1	3	2	5	29
Umpqua	0	11	34	10	11	20	9	95
Total	41	111	798	1,095	209	663	179	3,096

**Excludes non-admitted students and postbaccalaureate non-grads*
Source: OUS Institutional Research Services, 1996-97 ERAN-05 report

Table 3
AA/OT Degrees Awarded by Oregon Community Colleges

Community College	1994-95	1995-96	1996-97
Blue Mountain	95	100	69
Central	151	121	122
Columbia Gorge	15	14	23
Chemeketa	296	277	304
Clackamas	139	197	181
Clatsop	31	26	19
Lane	201	225	218
Linn-Benton	103	92	117
Mt. Hood	232	163	218
Oregon Coast	9	5	28
Portland	274	243	355
Rogue	52	65	85
SW Oregon	62	48	69
Tillamook Bay	8	2	5
Treasure Valley	120	113	139
Umpqua	79	90	79
Total	1,867	1,781	2,031

Source: OUS Institutional Research Services

Recent Campus Activities

For several years, OUS institutions and community colleges in the state have been working together to forge partnerships and undertake new initiatives to facilitate a smoother transition for students as they migrate across institutional boundaries. This section describes recent efforts (meant to be illustrative, not all inclusive).

Eastern Oregon University

- Regional Partnership: Financial Aid. Eastern has consortial financial aid agreements with a number of community colleges that facilitate joint enrollment and transfer, and is presently developing a new agreement that will permit all financial aid administrative work to be located at the home institution. Called "The Oregon Model," it will first be implemented with the Eastern Oregon Collaborative Colleges Center (EOCCC), which involves EOU, Treasure Valley Community College (TVCC), and Blue Mountain Community College (BMCC). The model permits a student's home institution to contract with other institutions for the coursework not offered at the home campus.

- Course Equivalencies on the Web. Eastern has complete course articulation tables showing how courses from most other Oregon institutions would transfer to EOU. Also available is complete information on courses and degree requirements for every academic program at Eastern.

- "Other-Campus" Programs. For more than a decade, EOU has delivered baccalaureate programs on the BMCC and TVCC campuses. Eastern's teacher preparation programs are delivered on the campuses of Central Oregon Community College and OIT. And, in collaboration with other universities, Eastern delivers the Tri-State General Agriculture degree to BMCC and TVCC.

Oregon Health Sciences University

- Articulation: Nursing. In 1993, the OHSU School of Nursing, in collaboration with the Directors of Associate Degree Nursing Programs in the state, developed, for RN students with an associate degree, an articulation pathway to facilitate their matriculation into the baccalaureate nursing program. Students are awarded credit for lower-division courses that are similar to those taught at the junior year of the baccalaureate program. Students may also earn credit for experiences they have had as registered nurses.

- Articulation: Emergency Medical Services. In 1997, the OHSU Emergency Medical Services (EMS)/Paramedic Education program established an interinstitutional agreement with Chemeketa Community College (CCC) so that graduates of OHSU's paramedic program could attain an Associate of Applied Science (A.A.S.) degree. Graduates receive a joint OHSU/CCC degree.

- Articulation: Medical Technology (MT). In 1997, an articulation policy was developed by OHSU's MT program, in collaboration with Portland Community College's (PCC) Medical Laboratory Technology (MLT) program. A few features of the policy include: MLT students with an associate degree may transfer up to 110 credits toward the baccalaureate degree; credits for upper-division courses may be awarded based on student transcript assessment; and, by review of portfolio and with accrediting agency approval, students will not be required to repeat rotations of clinical experiences obtained in the MLT program.

Oregon Institute of Technology

- Regional Partnership. OIT is engaged in a collaborative partnership with Klamath Community College (KCC) and PCC. (In this arrangement, the newly formed KCC contracts with PCC for program accreditation and infrastructure services.) OIT and KCC work together under an agreement providing for coordination of general education services, cross-registration services, and tuition equalization on selected courses. The institutional partners have resolved such difficult issues as differences in admissions standards, residency for tuition purposes, FTE reporting, tuition and fee differences, billing procedures, student confidentiality, and student services for shared courses.

- Articulation: Software Engineering Technology. OIT is also engaged in an articulation agreement with PCC for students intending to transfer from the PCC software engineering technology program to the OIT program. PCC students are given full credit for all selected courses listed in the agreement.

Oregon State University

- Joint Admission. A joint admission program between OSU and Linn-Benton Community College (LBCC), to be implemented fall 1998, will allow students to be co-admitted and co-enrolled at both institutions. Discussions are underway for a similar program with Southwestern Oregon Community College (SWOCC).

- Course Equivalencies on the Web. OSU has articulation tables of coursework, including baccalaureate core courses, from almost all Oregon public and private two-year and four-year accredited colleges and universities on the Web. This database provides students, advisors, and others with a ready source of information on how courses will transfer to OSU.

- Communications. A new Transfer Recruiting Coordinator (teamed with the OSU Transfer/Articulation/Processing Coordinator) has been named to increase and improve communication with community colleges. In addition, an OSU Transfer Brochure, accompanied by articulation tables, catalogues, and open house/ visitation schedules, has been distributed to the community colleges.

- Easing Transfer. Revisions are being made in the OSU Academic Regulations to allow students to transfer professional-technical courses more easily, and in the admission policy as it relates to repetition of courses and use of nondegree coursework for transfer admission.

Portland State University

- Partnership. In January 1997, PSU and Clackamas Community College (CCC) entered into a partnership agreement that promotes the successful movement of students between the two institutions. The arrangement has led to the creation of collaborative student support services, including joint student recruitment, co-admissions, integrated advisement and orientation, financial aid consortium agreements, and shared library and technological support services. Currently, 75 students are co-admitted to both institutions. Additionally, the agreement has integrated curricular offerings, enhanced faculty collaboration, and improved program articulation. PSU is actively involved in establishing similar partnerships with other community colleges in the metropolitan area.

Southern Oregon University

- Regional Partnership. SOU and Rogue Community College (RCC) have developed policies and procedures so that students can register for courses in Medford at either institution's registration centers. Staff are cross trained to use registration software and to answer questions about both RCC and SOU. Staff also spend time on site at the other's location, helping out during busy times. The two institutions have agreed to policies on student advising, testing for placement in math and writing courses, and have a financial aid agreement covering students co-enrolled at both institutions. Consistent with their intensive collaborative efforts, SOU and RCC share classrooms, science labs, and computer labs in Medford. The campuses have developed schedules that cross list courses so students can easily see all the offerings by both SOU and RCC (in the Medford area). A pilot project with a shared staff member helping to strengthen Native American programs at both institutions is in progress.

University of Oregon

- Preparation for Transfer. During winter and spring terms, UO and Lane Community College (LCC) jointly teach a course at LCC for students who plan to transfer. Prospective transfer students are given an introduction to processes, services, and physical facilities at UO. Each May, UO hosts a special orientation program targeted toward Oregon community college students who intend to transfer to UO in the fall. The program includes meeting with an adviser and class registration.

- "Other-Campus" Program. Planning is underway to offer the UO General Science major collaboratively with Central Oregon Community College (COCC) under the auspices of the University Center. All required coursework would be available in Bend.

Western Oregon University

- Partnership: Admission. A joint admission agreement with Chemeketa Community College (CCC) has recently been reached so that students are co-enrolled at WOU as they enter CCC. A special fast-track admission process has been implemented at Western for any CCC student completing an AA degree in computer science, fire service, or criminal justice. A similar fast-track enrollment and registration system is being developed for CCC graduates in teacher education.

Other Intersector Activities

In addition to the previous examples, other ongoing intersector activities demonstrate the increasing seamlessness of the educational sectors. Examples of these follow.

The PASS Project. OUS has been working collaboratively with high schools and the Oregon Department of Education (ODE) to develop new performance-based admission standards. This system, known as the Proficiency-based Admission Standards System (PASS), is unique in the nation. PASS is organized around a series of standards specifying what students need to be able to know and do to succeed in college. Students demonstrate these skills via tests, common performance assessments, and bodies of evidence their teachers score using common statewide criteria. Currently 30 high schools — enrolling 40 percent of the high school students in the state — are participating in the piloting activities.

Regular Meetings of Chief Academic Officers. At least once a year, the chief academic officers of System institutions and the community colleges convene to discuss intersector matters. Agenda topics have included transfer policy issues, distance delivery of courses and programs, the development of a common Web page (Oregon Network for Education — "ONE") for all educational sectors, and the partnerships that continue to evolve.

Discipline-based Faculty Meetings. A recent National Science Foundation grant program, administered by PSU, will convene meetings of faculty in math, sciences, and teacher education from all educational sectors — K-12, community colleges, and higher education.

Joint Boards Articulation Commission. The Joint Boards Articulation Commission (JBAC) has recently formed seven "action teams" in areas relating to transfer and articulation. The aim of the JBAC is to develop recommendations in these areas for Joint Boards' consideration and toward further clarification of transfer credit planning called for in HB 2387. The areas under consideration are:

- *Credit for Prior Learning.* Individual postsecondary institutions have varying policies regarding the granting of academic credit for experiences obtained outside the traditional classroom environment. Often, credit granted for such experience does not transfer between institutions and students are confused by the differences in institutional credit-granting practices.

- *Early Options.* A variety of options are available to high school students who wish to pursue college-level work during high school. Practices regarding acceptance of such credit for transfer are not uniform. A study of current policies and practices regarding the early participation of high school students in college courses and programs has already been endorsed by the Joint Boards. This is intended to lead to a determination of the need for a more standardized early options program in the state. The study, conducted by the OUS Office of Academic Affairs, is well along, and a final report to the Joint Boards is anticipated in summer 1998.

- *Professional-Technical Courses.* Courses of this nature are vocationally oriented and traditionally have not been considered in the mainstream of courses that are "college transfer." The demarcation between "professional-technical" and "college transfer" courses is not as clear as it once was. Additionally, in recent years, many Oregon community colleges have revised the numbering system for their professional-technical courses (an alpha-numeric numbering system the same as for transfer courses), leading to some confusion regarding what is intended to be college transfer coursework and what is considered professional-technical. Many System institutions limit the number of professional-technical credits accepted as elective transfer credits, frustrating student transfer efforts. A policy regarding the inclusion of professional-technical credits as electives in the block transfer AA/OT degree has been a neglected area. The JBAC Student Transfer Committee is currently developing its recommendations.

- *Data and Information Tracking.* Much progress has been made in recent years toward the sharing of student data between the Office of Community College Services and the Oregon University System. We are now able to track, better than ever before, the movement of students between systems. The action team will suggest improvements to the arrangements already in place.

- *Seamless Student Services.* For students to move easily between an Oregon community college and a System campus, better integration of student services is needed. Such services include (but are not limited to) advising and counseling, registration, and financial aid. An action team will recommend ways to facilitate student movement between sectors.

- *Proficiency-based Education.* With the advent of school reform in Oregon, OUS developed a Proficiency-based Admission Standards System (PASS). The community colleges have been working on a proficiency model for entry into specific programs (PREP). How these two admission strategies will relate is the focus of this action team.

- *Joint Boards Articulation Agreement of 1993.* An agreement approved in 1993 by the Joint Boards of Education, sets out principles guiding articulation between the community college and higher education sectors. The agreement needs revision to reflect current realities, such as the exponential growth of distance education efforts.

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Board Authority

A. University System Curricula

2.001 Board Oversight of Higher Education Curricula and Institutions

(1) The Board shall exercise general oversight of curricula and instruction in the System including, but not limited to, approval and deletion of curricular allocations, and the establishment and closure of schools or colleges. The Board's primary consideration, in meeting curricular responsibilities, shall be to ensure that high-quality educational opportunities are provided to qualified citizens in as accessible and cost-effective manner as possible.

(2) The Chancellor's Office shall keep the Board informed of state educational needs and shall encourage vigorous institutional planning to meet these needs.

(3) The Chancellor's Office shall act in other capacities regarding curricula and instruction as the Board may determine.

2.010 Missions of System Institutions

System institutions shall provide: (a) instruction, (b) research, and (c) public service. Of these, instruction shall hold the highest priority. Research and public service, as integral corollary functions to teaching and learning, may vary from institution to institution in their relative emphasis among the three primary mission areas. Research, scholarship, and creative activities shall be recognized as a necessary and inseparable part of the teaching-learning process, particularly in graduate and professional education, and as vital to Oregon's health and prosperity in the global information age.

2.015 Approval of New Academic Programs

(1) New academic degree programs will be approved by the Board upon recommendation by the Chancellor. Academic degree programs include baccalaureate, professional, and graduate degrees of all types; certificates; and educator endorsements.

(2) Criteria for proposal of new academic programs by System institutions shall include, but not be limited to, the following:

(a) The needs of Oregon for higher education and the state's capacity to respond effectively to social, economic, and environmental challenges and opportunities.

(b) Student demand that may not be met satisfactorily by existing programs.

(c) Program duplication is primarily of concern at the graduate and professional levels; therefore, a duplicated graduate or professional program must be specifically justified in terms of state's needs, demand, access, and cost-effectiveness.

(d) The resources necessary for the program are available within existing programs; have been identified within existing budgets and will be reallocated; or will be secured to meet reasonable timelines for implementation, typically within a two-year limitation.

(e) The congruity of the proposed program with the campus mission and its strategic direction.

(f) Where appropriate and feasible, the program is a collaboration between two or more institutions that maximizes student access, academic productivity, and quality.

(3) The review and approval process consists of the following steps:

(a) Using the guidelines and format for submission of fully developed program plans, campuses will submit proposals to the Chancellor's Office, which will place the proposal on the next regular meeting agenda of the Academic Council. The Academic Council will review the program proposal in accordance with the criteria. If the proposed program is at the graduate level, an external review will be required and subsequently reviewed by the Academic Council.

(b) If no major issues are left unresolved as a result of these deliberations, the Chancellor's Office will provide abstracts of the program proposals to other Oregon postsecondary and higher education institutions and the state's Office of Degree Authorization. Under administrative rules implementing provisions of state law, the System is required to give notice of intention to establish a new program before final Board approval is given, in order to allow for resolution of any claims of "detrimental duplication" or "significantly adverse impact" by an institution in another Oregon education sector. If no such claim is made in a timely manner, the internal process of program approval moves on to the next step. If a claim is made, the parties involved must follow the procedures specified in the state's administrative rules before continuing on to the next step in the System's approval process.

(c) i. If the Board's criteria and the notice provisions are met, the vice chancellor will recommend the proposed program to the Chancellor for approval and placement on the Board's consent agenda.

ii. If, in the course of the Academic Council's and Chancellor's Office deliberations, it is determined that the proposed program does not meet the Board's criteria and the institution wishes to proceed anyway, the program will be presented to the Board for review and disposition after the statewide notice provisions are met.

iii. An annual summary of programs approved and programs closed will be reported to the Board.

2.021 Honorary Degrees

Each institution, with the concurrence of its faculty, may decide to award honorary degrees.

(1) An institution wishing to award honorary degrees shall adopt criteria and procedures for selection to ensure that the award will honor outstanding contributions to the institution, state or society, and/or distinguished achievement.

(2) Criteria and procedures for selection shall be forwarded to the Chancellor or designee for approval.

(3) An institution with an approved selection process shall forward its nominations and a supporting case statement for each nominee to the Chancellor or designee. The annual process should be planned to enable the Board's consideration at least 90 days before the date for awarding the degrees.

B. Instructional Program

2.025 Academic Calendar

The regular academic calendar of the System shall consist of fall, winter, and spring terms, and a summer session.

(1) After consultation with interinstitutional councils, as appropriate, the

Chancellor's Office will set standard dates for the starting and ending of instruction for fall, winter, and spring terms, in order to facilitate interinstitutional curricular collaboration, articulation, and student access.

(a) A rolling five-year System academic calendar will be published annually.

(2) Within the framework of the regular academic calendar, institutions are encouraged to offer alternative course formats and schedules to ensure greater curricular access and flexibility to constituents whose personal and/or professional commitments might preclude access to the traditional academic schedule.

2.030 Credit for College Courses Taught in High Schools or Through Distance Education

Each institution may offer college-level courses taught for credit in high schools or through distance education to serve high school students.

(1) These course offerings shall be at the postsecondary level, and in addition to high school-level courses required for graduation. When courses are taught at the high schools, course materials shall be the same as, or equivalent to, those of the institution awarding the credit.

(2) Student eligibility for college-level credit courses will be mutually determined by the sponsoring institution and the high school.

(3) Registration processes and tuition will be determined by the sponsoring institution.

(4) Earned credits and grades will be transcripted by the sponsoring institution.

(5) High school teachers of college courses shall possess comparable qualifications to instructors of the disciplines in the sponsoring institution and shall be approved by the sponsoring institution's departments. College teachers may also teach college courses for high school students.

(6) Teaching/course evaluation practices shall be comparable to the practices of the sponsoring institution's department.

2.035 Undergraduate Transfer and Articulation

The Board affirms the importance for Oregonians to have maximum program articulation, course and credit transferability, and recognition of proficiencies that can be demonstrated. The Board recognizes that this is a shared responsibility among education providers and individuals. Toward achievement of these goals, the Board expects that:

(1) In a changing environment with growing access to electronically-delivered coursework, and transfer students presenting transcripts from multiple providers, System institutions should be flexible in accepting academic credits from accredited entities. Institutional practices should balance the integrity of a specific System institutions's degree with the reality of the dynamic educational marketplace (so long as admission, degree program, and graduation requirements are met).

(2) Each institution shall regularly update and publish information regarding course equivalencies between the institution's courses and partner community college courses and, in other ways, be responsive to transfer students' information and advising needs. Each institution shall also be guided by statewide agreements that enable broad-scale student transfer to occur among all System institutions and community colleges in Oregon.

(3) Each institution shall develop policies and practices that accept a reasonable amount of professional-technical coursework as electives or related work into baccalaureate degree programs.

(4) Where appropriate and feasible, institutions shall develop specific articulation agreements and co-admission/co-enrollment programs with community colleges and other partners in order to promote the orderly flow of students between and among institutions.

(5) Through such mechanisms as the Joint Boards' Articulation Commission, the OUS Academic Council, and the Council of Instructional Administrators of Oregon community colleges additional transfer degree programs should be considered and, if appropriate, developed to prepare community college students for transfer into a broad array of baccalaureate programs.

2.040 Accreditation Reports

Each institution shall submit to the Chancellor or designee in a timely manner both self-study and visiting team reports related to periodic general institutional accreditation by the Northwest Association of Schools and Colleges. Reports of specialized accrediting bodies on academic disciplines or professional programs shall also be submitted.

Vice Chancellor for Academic Affairs

2.100 Duties of the Vice Chancellor for Academic Affairs

(1) Under the direction of the Chancellor, the Vice Chancellor for Academic Affairs directs work of the System Office relating to academic programs, student and faculty academic affairs, and school relations.

(2) In the area of curricular and instructional affairs, the Vice Chancellor for Academic Affairs shall have full responsibility within the Board's Office for development of studies, policy analyses, and recommendations for the Chancellor and the Board.

(3) In the areas of student affairs and faculty affairs, the Vice Chancellor for Academic Affairs shall have major staff responsibility. Aspects of student or faculty personnel issues that have fiscal implications shall be coordinated with the Vice Chancellor for Finance and Administration.

(4) The Vice Chancellor for Academic Affairs will chair the Academic Council, an interinstitutional advisory group consisting of the chief academic officers of System institutions, whose primary functions shall include, but not be limited to: exchanging information, coordinating the planning of academic programs within the System, reviewing academic program proposals, encouraging collaborations, and stimulating and guiding a broad range of academic initiatives.